Susan Duke

Shalom-Building

peace in the parish

Feelings at work among us this day probably include a touch, at least, of embarrassment that we are even talking about conflict in the church.

- *After all, the church of Jesus Christ should be a place of peace and quiet. We are supposed to be people of the Prince of Peace. So when there is stress and conflict among us, that must mean that we are not a really "Christian" church.
- *From sea to shining sea, America is hauling itself off to court. We have become the most litigation (law suit) prone society in history! Maybe this spins off from Sweepstakes Syndromes ("gimme-something-for-nothing"); or does it come from Americans' "immediate gratification" standard, the Rich Young Ruler revisited--that Entrepreneur who knew no Neighbor. Perhaps, for many. For most, conflict and stress are so unpleasant, so destructive and hurtful that we'd really like to hand such things over to experts--let them handle such problems for us.

Well, both short paragraphs (above) typify unbiblical and unbelievers' views of conflict and peace and the Christian church.

- *If the absence of conflict is a "mark" of the True Church, then the apostolic church did not qualify. Read Acts and Galatians! When it comes to church fights, compared to the Apostles we are bush league amateurs.
- *The Christ-centered "Bond of Shalom" is the biblical "mark" of Christians and the Christian church. That is a distinctive kind of oneness (Ps. 133) which can so easily be misunderstood in English translation. Consensus, smooth sailing, agreement on the issues, pulling together: These may be desirable objectives for human organizations. But they do not constitute the Church. God's Bond of Shalom (Ephesians 4:3-6)* does that. This "Bond" is about in whose Name and how we cope with our differences or outright conflicts.
- *In Gods Word, the how this is done is called "Shalom-Building" (James 3:18, "the harvest of Righteousness is sown in Shalom by those who build Shalom"). This 'how' emphasis comes through also in Matthew 18:19, "whenever two of you make symphony (symphoneisosin [!]) in how you deal with any everyday conflict (pragmatos, pragmatic; tr. also via the textual sequence to v. 20), it will be ratified (blessed) by my Father in heaven."

Let's be clear on several matters: First, biblical Shalom-Building focuses on everyday conflict...and Christ-centered ministry to it. Second, it is evangelical ministry to conflict...among and by the priesthood of believers. Third, Shalom-Building is a specifically religious approach to conflict...distinct from sociological ("conflict management") and psychological ("conflict resolution") models. Fourth, conflict ministry has tested out as more realistic, practical and effective in coping with chronic features of conflict than any of those secular methods. Fifth, beyond realism and effectiveness, biblical Shalom-Building practices a key principle for Christians: how we cope with our conflicts shows what we really believe!

As a congregation, too: how we bridge our belief and behavior with each other, here, can become an example and encouragement to members' everyday conflicts and stress in our own homes. Beyond our midst, there is an opportunity for evangelism and mission: considerable evidence indicates that most "backdoor losses" (inactives) by congregations are triggered by personal/family conflicts which isolate that household from the congregation's ministry--disjunction between belief and conflict behavior. Indeed, everyday conflict may be the chief unmet opportunity for evangelical ministries in our generation!

*The original Constitution (and 1978 Handbook) of the Lutheran Church-Missouri Synod makes this the First Object of LC-MS.

SHALOM-BREAKING What kinds of conflict are Christians called to minister to? Except to paranoids, of course, not all differences and fights are life-threatening. Put briefly: we attend to everyday conflicts--in church or personal life--which threaten to kill/mortally wound the "Shalom-Self" God created and established between us. As in marriage, so in the Church: these related examples are the theme of Ephesians, in a profound yet distinctive feature of evangelical Christianity which is commonly overlooked.

* When God creates the Church of Jesus Christ, He brings people together in an amazing way: He creates "One New Person" from all of us. This new Person exceeds the sum of the previous parts. It's as if God brings two dimes together to create...a quarter. This underlies the "two shall become one flesh" business; other, similar references abound. But this theme is clearest in Ethesians (e.g. 2:13-21, especially v. 14-16; cf. 5:28-29 [the "Self" being loved and cared for]). Whether in Christian family, marriage, church, vocation: when God creates our relationship, we are "bonded together" in a whole new Self or Person or..."Body" (this theme also is basic to Paul's "Body" language for the Church).

* How we cope with differences and issues must nourish this God-created whole new Person. Anyone who tries to be "right" on the issues in ways which wound that Person may be no more of Christ than is the heretic (Herman Sasse, This Is My Body, p. 135). Tough words: the biblical background for "Shalom-Breakers" labels them as murderers--not only such self-righteous but also gossips who thereby murder the Shalom-Self (the God-created "one new Man" of Ephesians 2:15). On the other hand, our life together in this miraculous creation means that when I see you as the other face/side of our God-given "QUARTER," I can care for my "side" by caring for your "side" even when--emotionally and humanly--I'm not ready to make concessions to you. In Christ, "US" is more than You and Me!

* This is why less than 50% of biblical teaching on Sin has to do with private moral transgressions. The other 50% is about my Shalom-Breaking sin, my sin against the new Self which God creates for me in life with others. The background for that Lords Prayer petition ("Forgive us our trespasses (sin) as we forgive those who trespass against us") suggests the spoken original phrase was closer to "shalom-breakings" than our English "trespasses."

* So our ministry is to conflict which:
  --threatens to kill the new Shalom-Self (Body, Person, New Man, etc.) God has created and given us in Christ; and/or which
  --separates others from God's free gift of New Life in Christ.

SHALOM-BUILDING Conflict Ministry takes seriously several important biblical emphases on "conflict" and "Shalom:"

1. The distinctive biblical attitude toward conflicts. In Gods Word, everyday conflicts are God's opportunity to create and nourish new life in Christ, among us and through us. (Contrast this with our usual negative attitudes and expectations around conflicts.) Most major instances of redemption and revelation in Scripture are set in contexts of everyday conflict...precisely the contexts too many Christians today barricade off from the healing Gospel.

2. The blessing and healing certainties which are realized whenever we cope with our conflicts by Shalom-Building. For centuries, the blessing and healing emphases in Matthew 18:15-20 have been suffocated under bondage to the Law. It's been called the "Church Discipline" text. You don't even have to know Greek: just read this passage--carefully--in English translation. There is powerful Gospel in here, not merely Law. Indeed, verse 20--about Shalom-Building!--is the "Great Promise" text of the New Testament, the most radical Christological claim by Jesus anywhere in Scripture. In a text about... conflict??

3. Christians can cope with their conflicts from the very center of the Christian faith. Shalom-Building is founded and focused in Word and Sacrament. Indeed, one way to summarize how the Christian Shalom-Builder copes with everyday conflicts is this: I turn toward you the same face Christ turns to me! We deal with each other the very same way Christ deals with each--and all--of us.

4. The biblical teaching on "Shalom!":

   a) Shalom is wholeness and well-being in the midst of stress and conflict (i.e. we are not out to eliminate conflict and differences):

b) Shalom is God's gift (rather than something we "make"), given to us in Christ, the foundation upon which we build;

c) Shalom must be Christ-centered, else it is not genuine Peace;

d) Shalom is given in everyday contexts (it has little to do with private "peace with God");

5. Shalom-Builders keep "issues" subordinate and secondary to the vitality of our God-created relationships--that 'Shalom-Self' or whole new Person. In Christ, we even can delight in the things unsettled between us!

CHRONIC FEATURES OF CONFLICT: If we focus on "issues" not only do we lose sight of relationships' priority, but we won't get to the heart of the conflict. In everyday personal life, Shalom-threatening conflict is "over-determined" (multiple causes on multiple tracks). Usually, the conflict is a cry for help...for a greater need beyond/beneath the "issues."

1. The Past runs amuck (i.e. "in a frenzy to kill"). The Past--in my conscience, in marriage and family, in congregations--is [a] enormously powerful in and of itself, and [b] a deadly weapon in the hands of Satan. It is silly and naive to "declare a truce" about it. Or, to re-name it as "Prologue" to something or other. Or...to imagine that "Time will heal all wounds." In fact, so much is at stake in who is Lord over the Past (and Future) in the Christian's everyday life that God's very Name is: the Lord of Time (JHWH, in Hebrew; Alpha-Omega, in Greek). Secular methods are virtually powerless to cope with this chronic feature of conflict. Shalom-Building has effective and powerful means for us to do just that.

2. Personal tracks, beyond/behind the issues, along which conflictors are--in reality--traveling. This feature amounts to a fact of life in church conflict, too. Here is at once a person's region of need to discover--very specifically--how God can restore Shalom to that life, and an opportunity for Brothers and Sisters in Christ to reach out to that person in Christ-centered love. On the other hand, if we concentrate only on "issues" we are bound to miss great opportunities for personal ministry to each other. A warning, however; the hidden hurt or personal conflict is usually so painful that the conflictor relies on public conflict to buffer that pain, help him/her survive...until healing happens. So excruciating patience and guileless persistence are required of Shalom-Builders with such a one.

3. Collapsed priorities are typical of conflict dysfunctional people, families, churches. This is when institutional self-interest becomes a church's highest operative priority. (It shows up in how people are selected for leadership, how we treat each other, how we measure our effectiveness...rather than in our rhetoric and lofty goals.) When priorities or, more precisely, decisive Values degenerate to low levels, everything becomes important...so nothing is important. You lose sight of what is worth fighting about, and what isn't. Your life, your home, your church has lost its marbles--doesn't know what's decisive anymore. This is why "settling things" is a pathetic objective for coping with conflict. Because then you are only playing games: the "settled" conflict will erupt all over again. The tactical measure of success for conflict ministry is to restore effectiveness on higher levels of decisive Values. Indeed, how we make (and deliver) our decisions also shows what we really believe.

4. Misplaced confidence in ability to cope--personally--with my conflicts. That is one reason why some may want to avoid the subject itself (as well as to avoid dealing with their conflicts), or turn it over to some Hired Gun. People's consciousness of a need usually won't rise any higher than their ability to cope with it. Evangelism? World Hunger? Conflict? Shalom-Building very specifically and realistically equips Christians with the key resources and instruments we need to cope--effectively--with our conflicts. So we can begin to understand why Scripture's insistence onf personal "Direct Solution" (those who must live with the solution should create it) coping with conflicts isn't some pie-in-the-sky impossibility.

5. Christians' Bombsight Biblicism. You know the type: they drop Bible verses like cluster bombs on every point made by the other side. These folks want to claim God on their side. (Which surely puts you behind the eightball, implying to others that Satan's in your corner on this.) So commonplace and ancient a habit, this biblical backfire

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strategy is terribly destructive. The key question to be asked is this: Do we bring the Word to the Conflict...or, Do we bring the conflict to God's Word? Bring Christ to the conflict...or, Bring it to Christ? The distinction isn't trivial. It makes an enormous difference, as well as affecting just how decisive the Word is to be among us.

6. **Minimal measures of success.** To "win," to be proven "right," or even "let's just settle this and be done with it:" these subvert Shalom in the Body of Christ. Success, instead is measured by whether we have coped with a conflict in ways which have--

   a) opened the situation to God's creation of new life in Christ among us;
   b) brought it (and us) to Christ and to His Word;
   c) restored our operating priorities to higher levels of effectiveness.

Matthew 18:15-20

A. Several vital emphases are specified and inform this surprisingly masterful passage. By the way, Bible scholars now realize that these six verses form a whole text, within this chapter on Forgiveness in Christ. (To split it up into two "sayings" [vv. 15-17b; 18-20] is exegetically indefensible.)

   1. **Direct Solution**--those who must live with a solution should create it... Themselves. Scripture is being practical and realistic in this emphasis:

      a) The more complex the conflict, the more necessary Direct (or, Personal) Solution becomes. The naive and inexperienced figure you need outside experts. But only you know what you actually can live with.

      b) When you create the solution, its integrity and durability are far better than if you have somebody else create it for you. They do so and our natural temptation is to try to weasel out of the deal, find loopholes. The solution collapses.

      c) When you emphasize personal/direct solution efforts, priority is more likely to be placed on your relationships. Issues can be kept where they belong: on secondary levels of priority.

      d) Conflictors--themselves--already have the pieces of eventual solution somewhere in their own minds. At first, usually they don't realize this. Particularly when the conflict is prolonged or bitter. Shalom-Building methods include ways to help them uncover what is already there.

   2. **Initiative:** The mark of the Christian in a conflict is who takes the initiative to restore Shalom. Compare Matthew 5:23ff and Matthew 18:15, for example. Regardless of who is at fault, who "started it," the Christian goes to that other person. Let's not tolerate the non-biblical habit of making initiative depend on who we think is right or wrong in the situation. You Go, Christian!

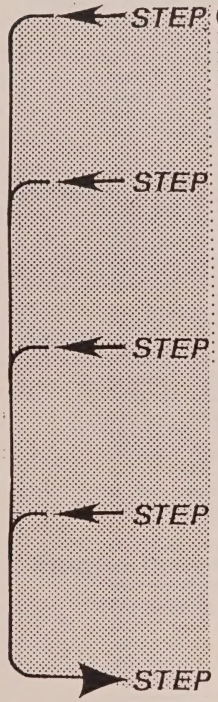
   3. **Immediacy:** "Don't let the sun go down on your anger" (Ephesians 4:25; also note the "Be angry, but do not break Shalom" portion of this verse). Some tiffs and gripes do roll off my back like water off a duck's. But three clues target the kind of "anger" that must be dealt with immediately: (a) when you sense or see it connecting with some other anger or hurt, (b) when you feel yourself filing it away in a private catalog of grievances, or (c) if you mull it over on your pillow that night before sleep finally comes. Such angers require Shalom-Building. Delayed, they become Shalom-Breaking. Why? Because the wound (though it seems like such a little "scratch") gains time to become infected, to swell up, get inflated. Its healing becomes more painful and difficult. That "tiff" becomes a lightning rod rising into the storm clouds, drawing to it all kinds of static (other hurts, frustrations, faults). You've become the victim of your own delay.

   4. **Realism:** Conflict ministry isn't an invitation to denial, repression, avoidance, projection, or other unreal tactics. "If we confess our real sin" is the sense of the original in I John 1:9. Since biblical Shalom-Building provides us with such effective--even redundant--certainties of complete healing when we do so in His Name, we can enter that long dark tunnel of our real hurts because we can see that Christ-sure "light at the end of the tunnel."

the Biblical FIVE STEPS for Christian Shalom-Builders

Matthew 18:15-20; Matthew 5:23ff (and 16:19); Ephesians 4:3, 25-32; and I Corinthians 6:1-7 are the chief New Testament texts which inform our understanding and use of the biblical "Five Steps."

The "Five Steps" apply throughout Christians' everyday life as well as in the Church. They are given us by Christ for our Blessing, not to turn us into rule-driven Pharisees.



STEP ONE: Direct Solution *efforts by the Conflictors on their own intitiative, immediately, without others present--in good faith!*

STEP TWO: Audicator's Assistance *in their Direct Solution efforts may be requested by the Conflictors.*

STEP THREE: Church Reinforcement *of their Direct Solution efforts may be requested by the Conflictors (when need for more help from the Church is verified by the Audicator[s]).*

STEP FOUR: Indirect Solution *has to be dictated by someone else. But it may be a tragic necessity when good faith use of the previous three Steps hasn't been successful.*

STEP FIVE: Reconciliation Ministries *restore Conflictors to the 'Bond of Shalom' with God's People (each other and/or with others).*

AUDICATOR'S Functions: 1) Embodies the faith and presence of God's People among the Conflictors; 2) Helps the Conflictors to uncover God's Righteousness already present in their situation/relationship, and to pull aside Satan's deceptions overlaying the real root(s) of their Shalom-breaking conflict; 3) Helps each Conflictor discover his/her own real needs and limits; 4) Helps each one discover the other's real needs and limits; 5) Verifies the Conflictors' good faith efforts (not the "merits" or "issues") to the Church, whether it's for timely access to more help via Step Three or their readiness for Step Five ('Reconciliation Ministries," even when Step Four becomes a tragic necessity); 6) Listens for/discerns the pieces of eventual agreement which the Conflictors themselves reveal; 7) Helps Conflictors move back (and forth, as needed) to Step One from Step Two; and 8) Helps Conflictors to specify their responsibilities for "building" upon God's gift of Shalom.

NOTES

SHALOM-BUILDERS are inspired and directed by God's Word and Sacrament in how we deal with everyday conflict. *SHALOM* [in Scripture: well-being and wholeness, even amidst turmoil] is God's gift to us in Christ. We "build" upon that God-given foundation.

AUDICATORS are the biblical martyrwn (in the Greek text) of Matthew 18:16. They are unique to Scripture and quite different from the english word: "witness." The hebrew original is tzaddikim [tzah-dick-keem], or "righteous ones." The new word used here combines two of their major functions. *Audi-* indicates their listening role. *-cators* can point to their role as the "authenticators" of Conflictors' good faith use of the first three Steps. They have other significant tasks, above all to embody the faith and supportive presence of God's People with the Conflictors. As in the apostolic church, Audicators are qualified by the Church.

DIRECT SOLUTION means that those who have to live with a solution should create it themselves. In fact, the more complex and 'overdetermined' [multiple-caused] the conflict, the more necessary this becomes.

INDIRECT SOLUTION is any form of judgment (or even "what's fair") on the 'case' created for the Conflictors by somebody else. It may be a judge, a mediator or arbitrator whose 'recommendation' amounts to a judgment. For a congregation, "calling in" the District President for this juridical Step usually subverts the decisive authority of Gods Word whenever we do so to avoid our own Shalom-Building responsibilities.

RECONCILIATION MINISTRIES have many expressions. Shalom-Building emphasizes the priority of Shalom-relationships over merely "settling issues." Hence, these ministries may be focused upon the Conflictors' relationship to each other. Or, their purpose might have to be to restore the Bond of Shalom with extended families and others. The rites and services being used directly relate to the Sacraments.

PRINCIPLES:

1) We bring our conflicts TO Gods Word and Sacraments (rather than "make Scripture relevant");

2) We discern Law AND Gospel in such "discipline" texts (e.g. specify the required Blessing).

Peace in the Parish

RELATED TEXTS

One: INITIATIVE: Note that while Matthew 18:15 refers to a neighbor's shalom-breaking against you, Matthew 5:23ff puts it in terms of the other's grievance vs. you. In other words, you--Shalom-Builder--take the initiative! IMMEDIACY: Eph. 4:26-27 ["Even if you are angry, you must not sin (break shalom): never let the sun go down on your anger or else you will give the Devil a foothold"]; for the early church, it's the same [cf. Didache 4:3; note the Warning of 14:3].

Two: I Corinthians 6:1-7 [especially v. 5: "Is there really not one tzaddik (reliable/righteous man) among you to help settle disputes among the faithful?"]. Galatians 6:1-2, "Christians, if one of you breaks shalom, the more spiritual (tzaddikim) of you who restore (from: to set a broken bone) him should do so in a spirit of rahamim (lovingkindness)...you should carry each other's troubles and so fulfill the Law of Christ." II Timothy 2:24, "A servant of the Lord (tzaddik) is not to take partisan side in disputes but must rahamim (be Love's Warrior to) each one, a good teacher, and patient." And Isaiah 3:10, "Say of the tzaddik that it shall be Shalom with him, for they shall eat the harvest of their actions" [cf. James 3:18, "And the harvest of Righteousness shall be sown in Shalom by those who build Shalom"]. Isaiah 54:13, "And all thy builders shall be taught of the Lord, and great shall be the Shalom of thy builders" (bonayik=thy builders, not banayik=thy children).

Three: This Step includes numerous references to our mandate to help each other, bear each other's troubles, rahamim/shalom each other. For example: Ephesians 4:15-16 [cf. v. 3, as a mark of the true Church], "If we live by the truth in love (rahamim), we shall grow in all ways into Christ, who is the head by whom the whole Body is fitted and bound together...So the body grows until it has built itself up in love." The apostolic church (cf. the Qumran documents) gave procedural shape to help from the Church: conflictors cannot bring their dispute to the community until good faith use of the first two Steps has been exhausted [1QS 2:4-7, 11-17; 3:4-5; 6:24-7:25; 8:16-9:9; CD 12:4-6]. Of course, passages such as I Corinthians 6 and Galatians 6 [cited above] relate here.

Four: This is the "judgmental" or "discipline" Step of the biblical process. Titus 3:10-11 is a typical reflection on Matthew 18:17b, "If someone breaks Shalom over what you teach, after a first and second warning [e.g. the first two Steps and recourse to Step Three may be implied], have no more to do with him. You will recognize that any such person has already lapsed and relegated himself to [the status of] being a sinner." Note that this is a menuddeh (demotion to inferior status, temporarily) rather than a herem reference, as also in Matthew 18:17b. For "excommunication" discipline's tragic necessity, Mark 9:43-47 is more appropriate [also ICor. 5:1-13; ICor. 12:12-27; and IICor. 13; Romans 14:10-13]. However, both in Scripture and the Confessions, such a tragic Step's intent must be--demonstrably!--not only to heal the Body of Christ but for the offender's restoration/reconciliation with the Church. E.g. in IICorinthians 2: 5-12, Paul specifies this intent as a bridge to Step Five, after a Step Four "judgment" has been made: "I have forgiven it for your sake in the presence of Christ [cf. Matthew 18:20!]...Give him now your forgiveness...Give definite proof of your love/rahamim for him."

Five: Matthew 18:19 continues the sequence toward Reconciliation ministries, via its description of Shalom-Building solutions as [literally] "symphony" agreements--those which you can "live with" and which restore your Shalom-relationship will be "ratified" [literally: 'come off,' 'succeed'] by our Father in heaven. Even our Shalom-Building with "everyday" [pragmatos is not some "spiritual" specification!] and sometimes "trivial" conflicts has eternal consequences and their destiny in God's Blessing. This is the Step which may include the "Binding-and-Loosing" ministry (Matthew 18:18 and John 20:23 are Greek translations of an aramaic/hebrew original). Its theme of Forgiveness continues through v. 35. Cf. Ephesians 4:3, IICor. 5:16-21. Upon the pillar of Shalom-Builders in Christ's Name does the Church's health and redemption rest (e.g. James 3:18; cf. also IJohn 4:20-21 and IPeter 3).

Matthew 18:15 If your neighbor sins [breaks Shalom] against you, go and tell him his fault between you and him alone. If he listens to you, you have gained your neighbor.
Matthew 18:16 But if he does not listen to your admonition take one or two others along with you so that every word may be confirmed by the evidence of two or three Audicators [martyrwn/tzaddikim does not="witnesses"!].
Matthew 18:17 If he refuses to listen to them, inform the Church; and if he refuses to heed even the Church, let him be to you as a Gentile and a tax-gatherer [the rabbinic menuddeh demotion to a status which includes mourners, debtors].
Matthew 18:18 Truly I say to you: whatever you bind on earth shall have been bound in heaven, and whatever you loose on earth shall have been loosed in heaven. (Cf. John 20:23 and the remaining context of Matthew 18 for the sacramental and forgiveness frame of reference for this "authority.")
Matthew 18:19 Again I tell you that if two of you build symphonic relationship [symphoneisosin] on earth concerning any and every claim [pragmatos] they may be pursuing, it shall be ratified [lit.: succeed] on the part of my heavenly Father.
Matthew 18:20 Wherever [the] two or three are bound together [sunegmenoi] in my Name, I am present among them. (This is the 'Great Promise' verse in the New Testament, the "autograph" of Blessing to Shalom-Builders.)

Old Testament Sample References:

Zech. 8:16
Exodus 20:5
Exodus 23:1
Leviticus 19:7
Leviticus 27:29
Numbers 12:14
Numbers 19:20
Numbers 30:2ff
Deut. 7:1-5
Deut. 17:7
Deut. 19:15
Deut. 20:16
Jeremiah 31:34 [Heb. 10:16ff]
Isaiah 47:7 [Jn. 14:26]
Ezra 10:8;7:26
Psalms 25:7
Psalms 82:1

Early Church Sample References:

Didaché 4:3
Didaché 14:2-3
Didaché 15:3
Qumran:
1QS 2:4-7,11-17
1QS 3:4-5
1QS 5:24-6:1
1QS 6:24-7:25
1QS 8:16-9:9

CD 6:20-7:1
CD 7:3
CD 9:6-10
CD 20:2,8-15ff

5. Shalom broken between individual members means Shalom is broken for the whole Body of Christ. There were a powerful assortment of procedures around in the First Century (behind Matthew 5:23ff, for example; also related to Yom Kippur) for recognizing and dealing with this emphasis. We Americans have trouble with practicing the "Body of Christ." But here is a context where we can stand together and help one another in our mutual conflict ministries!

B. Comments on the "Five Steps" of Matthew 18

When these six verses are seen as a Law-Gospel "whole text," and we consider them in the light of passages such as Galatians 6, I Corinthians 6, Ephesians 2-6, Matthew 5:23ff, and others, we begin to understand what an enormous portion of Christianity is at stake in our congregation's Constitution's requirement that disputes shall be dealt with according to this Matthew 18 passage.

1. STEP ONE: "if he listens to you" does not mean that he's heard your "speech." Laying speeches on each other is not obedience to Matthew 18:15! There is a substantial amount of documentation behind this biblical phrase. Its key ingredient is **good faith** use of this Step. How can such 'good faith' be ascertained? One test is whether--after you've dealt with each other on the matter--both of you can tell another Christian (in each other's presence) what the other conflictor's real needs are; and the other one tell him/her what your real needs are. That takes a distinctively biblical kind of "listening." And, of course, it has to be "mutual;" it cuts both ways.

2. STEP TWO: this Third Party is unique to Scripture. So unique, we had to invent a new word: "Audicator." (The only English word which comes close to the originals--martyr[!], in Greek; tzaddik ["righteous one"], in Hebrew/Aramaic--is "Intercessor.") This person is a Brother or Sister in Christ ordinarily selected for this role by the Church (see Galatians 6:1-2 and I Corinthians 6:1-6); but, in exceptional and/or informed situations, other Christians can help each other in this way. [Qualifications for the Audicator are described in Session II.] This "Pillar of The Universe" is present with you both; but in a realistic--if unique--religious role. Neither "mediator," an "arbitrator," nor "referee," this person is a distinctive servant of your Direct Solution efforts.

3. STEP THREE is available if more help is needed from the Church. Not just "expert" help, either. And, the Audicator decides this (since demanding more "help" is a favorite tactic for avoidance taken by Shalom-Breakers). "Tell it to the Church" includes this first aspect:"...for more help."

   Thus far, it's Direct Solution, all the way. But if your good faith efforts exhaust all three Steps without success, then the next Step may become a tragic necessity.

4. STEP FOUR: "Indirect Solution" means having to call in somebody else to create the solution the conflictors cannot. It takes various forms: courts and judges and attorneys; mediation; but also things like dumping the matter on a congregational meeting (or, Board, Voters Assembly, etc.), "petitions," or "bending somebody else's ear." Scripture allows for this...but only when the previous Three Steps have been exhausted in good faith.

5. STEP FIVE: Various forms of "Reconciliation" ministry are indicated in Scripture and biblical practice. These include the Gospel use of Matthew 18:18 (Bond of Shalom "Sacramental Services," for example) and other usages, depending on specific needs for healing and new life among the conflictors. And, these Reconciliation ministries are in order at whatever Step has been successful in creating the "Shalom-Solution" (conflictors' agreement-in-principle which establishes the basis for restored Shalom between them...and for their shared responsibilities for building upon that Shalom).

These comments are additions to the (attached) Chart and may be explained further during our Session today, time permitting.

PRACTICAL CONSIDERATIONS (in discussion)

OFFICE MANAGEMENT TRAINING SEMINAR

OCTOBER 21, 1981

FEDERAL RESERVE BANK

BOSTON, MA

presented by:

JUVENILE JUSTICE MANAGEMENT TRAINING PROGRAM

and

MASSACHUSETTS HALF-WAY HOUSES, INC.

AGENDA

9:30 - 10:00 a.m.	Registration/Coffee Break
10:00 - 10:30 a.m.	Introduction BINGO!
10:30 - 11:30 a.m.	I. GETTING ORGANIZED AND STAYING ORGANIZED A. Your Work Space B. Your Time/Adopt a Plan 1. Choose a System 2. Categorize Your Tasks/Responsibilities 3. Put Your Plan in Motion 4. Planning Obstacles
11:30 - Noon	II. BASIC OFFICE SKILLS A. Overview 1. The What, When, Where, How and Why
Noon - 1:00 p.m.	---------- LUNCH * ----------
1:00 - 2:45 p.m.	II. BASIC OFFICE SKILLS (continued) B. Telephone Techniques/Tips C. The Typewriter and You D. Record-Keeping Systems/Methods - Filing E. Dictation/Transcription/Composition Methods F. Letter Writing G. Report Writing
2:45 - 3:00 p.m.	---------- BREAK ----------
3:00 - 3:30 p.m.	III. FOCUSING ON YOU A. Getting Started B. Your Work Cycle C. Communicating D. You, You, You
3:30 - 4:00 p.m.	IV. TIPS/SHORTCUTS/HINTS A. Questions/Comments/Ideas to Share
4:00 - 4:30 p.m.	CONCLUSION and EVALUATION

*You will be permitted one (1) hour for lunch at a place of your choice. There are several reasonably priced, fast-food restaurants within walking distance of the bank. Please return to the Fourth Floor lounge promptly at 1:00 p.m. to begin the afternoon session.

OFFICE MANAGEMENT TRAINING SEMINAR

October 21, 1981 One-Day Workshop
Federal Reserve Bank
Boston, MA

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OFFICE MANAGEMENT TRAINING SEMINAR

October 21, 1981 One-Day Workshop
Federal Reserve Bank
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For Your Own Notes

OFFICE MANAGEMENT TRAINING SEMINAR

Welcome to the first OFFICE MANAGEMENT TRAINING SEMINAR developed and presented by the Juvenile Justice Management Training Program and Massachusetts Half-Way Houses, Inc.

It is our intention to present an overview of basic office procedures and techniques designed for secretaries and administrative assistants. The program objectives are:

- to reinforce the importance of the position you hold in helping human service agencies operate efficiently,
- to focus on methods to improve or coordinate your operation, and
- to focus on you and your goals for the future with your present agency or another.

Through thoughtful planning, good organizational methods, learning to prioritize your work and being able to communicate and work effectively with all staff, you will find that your work is less frustrating, less stress producing, and more rewarding. The secret to good office management is knowing that you control your work — it does not control you.

During the day we will cover organizational skills, time management skills, basic office procedures, fundamentals of office systems and personal development. The emphasis throughout the program will be on realizing that being organized saves time, saving time produces more efficiency, and more efficiency provides a satisfying work experience.

While some well-known techniques will be presented in conjunction with tips developed along the way, you are also encouraged to share any tips and techniques you have found most helpful during your career.

WELCOME

I. GETTING ORGANIZED AND STAYING ORGANIZED

A. Your Work Space

Organization is a never-ending process. Organization is putting more order into your life so you can live more fully. It is having a place for everything so that you can retrieve it quickly without fumbling, searching or otherwise wasting time. Organization involves everything from your office, desk, files, to your home, pockets, or purse.

Make up your mind to get organized and to stay organized. Spend a day or night. Throw out unnecessary material or paperwork. Purge yourself of accumulation! Clean out your desk; put your files on a diet and make them thin! Decide where things should be kept so they are handy and useful. Rearrange your work area to work for you. Give yourself space.

"Psychology Today" reported on a survey of office workers which indicated that job satisfication was high when they liked their work areas. And the greater the job satisfaction, the better the performance.

Your Desk

Your work space must be conducive to the job you are required to perform. Of course you should have the essentials for performing your work — a desk, chair, telephone, etc. Begin with your desk. Are your supplies arranged in a way that allows you simply to reach in that direction to get what you need (stationery, forms, pens, pencils, etc.)? Is there enough space to put active material, outgoing material and incoming material? Or, is your desk a mess?

1. Telephone - Do you have a notebook, message pad, pen, telephone directory, address/telephone lists (Rolodex) handy by your telephone?

2. Typewriter - Is your stationery, bond paper, envelopes, carbons, eraser, dictionary, reference manuals and other tools handy by your typewriter?

3. Desk - Are the telephone and typewriter situated on the desk in a location which is not cumbersome to use? Or do you have to be a gymnast to type or answer the telephone?

4. Desk Drawers - Are your desk drawers used to hide the unsightly mess that would otherwise be on top — or are they used to store your supplies (frequently used items especially) conveniently organized?

5. Desk Top - Is your desk cluttered with rarely used books, manuals, papers, personal items? The desk top is your most used space...as such, it should be free of congestion and a minimum of items

should be there (the telephone, typewriter and in/out basket are standards). An uncluttered desk promotes organization, efficiency and the ability to concentrate on your tasks.

Schedule a time soon for you to do an inventory of your supplies and equipment. Why wait until you run out — in the middle of a rush project — and then have to scramble (wasting time) to borrow, beg or steal what you need.

Never leave your office at night until you have cleaned off your desk. This allows you to reconcile the day, consider what is ahead for tomorrow and will give you a head start in the morning. By organizing your desk each evening and listing the objectives for the next day, you are moving steps ahead and saving time and energy. Resist the temptation of just walking away from the mess at the end of the day. It will only be there when you return in the morning — a time wasting disorganized mess! Studies have shown that workers who leave the office with a clear idea of what they want to accomplish the next day actually enjoy their personal lives more in the evening. Clean desks permit clear heads.

These tips may sound trite or to most of you be simply common sense. But, stop and think about it. Anything you can do to make your day run smoother shouldn't be overlooked. Go back and really think about it. Is your desk and office space arranged to your best advantage? Does it allow ease of movement and comfort while working?

There is no right or wrong way to arrange your desk or your office. It is right only if it is organized in a way that allows you to work in your space without confusion, complexity and discomfort. Your accessory office equipment such as files, bookcase, chairs and work table must also be coordinated to complement your desk position and you.

By reviewing the exercise attached, you will be able to determine what changes, if any, you need to make to put your space to work for you. Complete this exercise when you return to your office. Read the instructions and then take the "test" to see if you are walking more miles a day than necessary. (If you fail the test, GET ORGANIZED!)

Office Maintenance

Once you have organized your work space in a style that offers convenience and comfort, practice keeping it that way. You spend one-third of your day at your office. Make it personal without "moving in." Personal touches help create an inviting environment — one you will appreciate as will others. Plants, pictures and posters are acceptable in moderation and good taste. You can personalize an office without giving the impression of having moved in.

You wouldn't invite people into your home if it were cluttered, disorganized and unkept; don't permit this condition in your office.

There are several valid reasons for you to maintain your office:

- not all human service agencies are affluent enough to afford janitorial services,
- because you want to maintain the organization you have developed, you are willing to perform chores which insure maintenance of this condition, and
- because it is your space and you have pride in your space, you practice office maintenance.

Remember — YOU ARE A PROFESSIONAL. If you sacrifice appearance, you will sacrifice performance. If you sacrifice performance, you will sacrifice professionalism.

EXERCISE

The purpose of this exercise is to determine the efficiency of your office as it is presently set-up. Follow these simple directions:

1.) In the square below indicate the placement of your desk, files, work table, windows, doors, closet, etc.

2.) Consider your daily routine; choose a task you are responsible for each day which may involve receiving work from others.

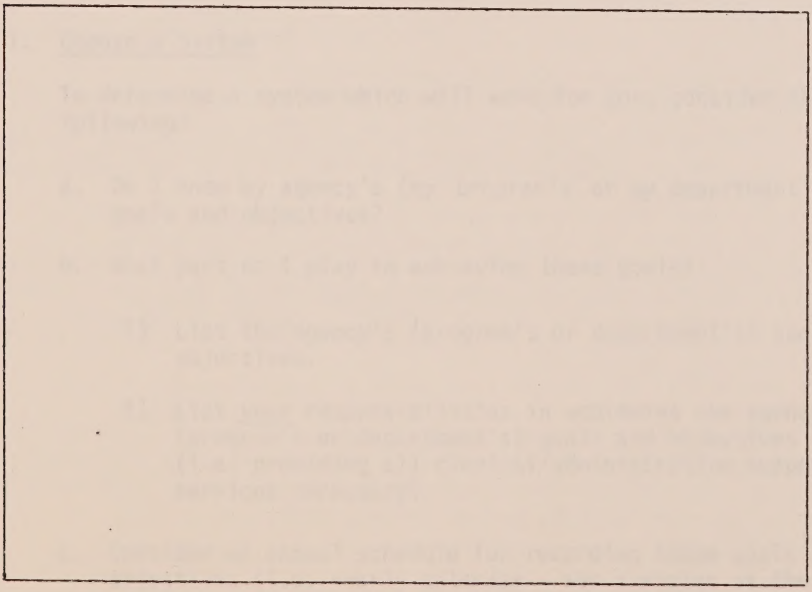
3.) Mark each step involved from the beginning to the completion of this task by indicating #1, #2, #3 at the appropriate spot in your office. Include trips away from your desk to files, or out of the office by indicating that number in the sequence at the doorway.

4.) When you have completed the task, connect the steps.

If you have a confusing pattern of movements which criss-cross each other, your office arrangement or procedure should be improved. If you have a smooth flowing line from one number to the next, you are working efficiently within your space.

Objective: Unless the work moves smoothly from one desk to another with little backtracking or wasted motion, your office layout can probably be improved.

Review this exercise with several of your important, time-consuming daily tasks and responsibilities to determine areas that could be improved.



B. Your Time/Adopt a Plan

Setting goals is a major ingredient of time management — actually, one is not possible without the other. Long-term goals will be determined in accordance with the goals and objectives of the organization for which you work. Do you know the goals and objectives of your agency? What priority is placed on them? What methods are employed to achieve these goals and objectives? Goals should be written and reviewed frequently for their continued appropriateness. Your daily, weekly, monthly, quarterly and yearly schedules should have time allocated toward accomplishing your goals. Providing time each day or week to work on major projects will help insure sufficient time to meet your goals.

Determining your goals depends on what is expected of you each day, week and month. The repetitive, scheduled and required tasks, and departmental, programmatic or corporate accountability reports mentioned in further sections will form the framework for establishing goals.

No system is meant to possess or control you so strictly that you lose sight of your goals. A good time management plan, once adopted and put into action, will become your new habit. There are, of course, stumbling blocks that may make achieving your goals seem difficult. Allowing others to interrupt and not resisting the temptation to deviate from your course will upset your efforts towards goal attainment. When setting your goals, include other people from whom necessary data will be received and with whom you must consult. They must be aware of your time plan and made a part of the decision-making process if they are to cooperate and you are to be successful.

1. Choose a System

To determine a system which will work for you, consider the following:

a. Do I know my agency's (my program's or my department's) goals and objectives?

b. What part do I play in achieving these goals?

   1) List the agency's (program's or department's) goals and objectives.

   2) List your responsibilities in achieving the agency's (program's or department's) goals and objectives (i.e. providing all clerical/administrative support services necessary)

c. Consider an annual schedule for recording these goals and objectives (i.e. yearly calendar - see examples at the end of this section)

d. Consider a quarterly/monthly schedule and record goals and objectives to be achieved during this time period. This is a beginning step towards being specific about how the goals and objectives will be achieved.

e. Finally, consider your weekly/monthly schedule. This step allows you to be even more specific about the spectrum of your responsibilities and how they will provide services which will ultimately attain the goals of your agency (program or department).

Learning to adopt a plan takes time to learn and to use effectively. How many times have you said, "There aren't enough hours in the day," "If only I had one whole day without interruptions, I'd get caught up," "My boss thinks I'm a machine," or "I just don't have time to do anything anymore." How often do you feel that time is closing in on you, pushing you to the brink? Do you often wish you had a secretary?

The reality of the situation is — you must learn to use the time you have effectively and efficiently — you must adopt a plan. Failing to plan is planning to fail!

Developing a plan to suit your needs, as well as those of your boss, department, program, and agency, is the first step toward achieving good time management. Begin by considering the points outlined above. Releasing yourself from established habits of poor use of your time will be difficult, but it can be done. Good planning will be rewarding: you will be able to avoid or cope with the unexpected crises, you will enjoy a feeling of accomplishment, and you will feel better both mentally and physically.

2. Categorize Your Tasks/Responsibilities

Adopting a plan will be easy if you take the time to list and specify all aspects of your work that will be the pieces making up the whole.

a. Routine Tasks - compose a list of the projects/tasks expected of you each day, each week, each month, each year. Restrict your list to only the routine (required or necessary) assignments for which you are responsible. Divide this list into:

1) Short-term projects - consist of the daily tasks for which you are responsible. These may include: telephone calls, mail (incoming/outgoing), filing, recording/scheduling daily events, duplicating, etc.

2) Intermediate projects - consist of weekly or monthly tasks for which you are responsible. These may include: weekly or monthly reports, ordering supplies, auditing petty cash fund, updating mailing lists, updating schedules, attending meetings, etc.

3) Long-term projects - consist of quarterly or yearly tasks for which you are responsible. These may include: quarterly/semi-annual/annual reports, cleaning out files/ supplies, inventory, arranging for audits, mass mailings, assisting in fundraising events and holiday functions, etc.

b. Non-Routine Tasks - Compose a list of all other projects/ tasks for which you are responsible tomorrow, this week, this month, this year. These are not routine tasks or assignments, but include:

1) Short-term projects (tomorrow) - attending/scheduling meetings, preparing invoices, writing/typing letters, receiving visitors/clients, responding to emergency projects, filling in for other staff, beginning intermediate project, etc.

2) Intermediate projects (this week/this month) - filing, handling a two or three day assignment, coming to aid of staff in need of assistance, etc.

3) Long-term projects (this quarter/this year) - developing a manual for your job or office procedures; working on a low priority project; revising mailing lists, rolodex/ or address lists, etc.

These two lists should provide a relatively complete representation of your tasks. Now go on to several other processes before reaching your final aim — adopting a plan.

c. Time Frames/Deadlines - Write the expected completion date beside each work assignment on both the routine and non-routine task lists you have prepared. Allow sufficient time to complete the tasks without being too rigid or too generous with your time.

d. Choose a Schedule - Choosing a format for scheduling your projects/tasks is now possible. Included at the end of this section are several examples of formats to consider. Good planning and using a schedule which keeps you continually aware of what is due and when, prevents crises. In some offices and situations it may be necessary to use more than one form of schedule; others may find the simplest form

most effective. A popular combination is using a daily to-do list, a monthly calendar, and a yearly wall calendar. Don't be afraid to experiment. Once you begin a plan of scheduling your work, adhering to it, and managing your time to meet anticipated/required deadlines, your work will progress smoothly--and time will be on your side.

3. Put Your Plan in Motion

Tasks and responsibilities have been listed, time frames/deadlines have been established, and a scheduling format has been chosen. Now, to implement your newly adopted plan for improved time management, the schedules should be filled in with the information you have recorded. Again, be cautioned when scheduling to establish realistic time frames and deadlines. Flexibility must be built into any schedule. While adhering to deadlines is important to attaining goals, time must also be included to meet such contingencies as interruptions, priority switching, crises/emergencies, the unexpected. When scheduling priority tasks, permit sufficient time to complete the job, allowing for interruptions. Schedule well in advance of deadlines. Then, if there is a need to switch priorities, you will have built-in contingency time for completing the job before the deadline arrives. In any case, deadlines must be set. All of your efforts and organization for managing your time effectively will fail if you establish unmanageable, unrealistic and improbable deadlines.

Reaching this point has required listing items which relate almost exclusively to you and your role in your agency's operation. There are many other points to consider once you begin to record tasks on a schedule:

a. Assignments you are responsible for completing which will require information, facts, figures or other data from colleagues--time must be alloted for the collection of this needed material.

b. Deadlines for low priority projects or tasks--because these responsibilities are not thought of as being pertinent on a daily basis, they are often ignored. However, the month goes quickly by and you find yourself racing to complete such jobs at the last minute. Ignoring the need to plan low priority items into a schedule is a major cause of the "last-minute-hurry-up-and-get-a-headache" syndrome.

c. Your best time of the day--often overlooked, but very important. Some people perform best first thing in the morning; others are late starters. Recognizing your peak periods of the day and adjusting your work plan accordingly is imperative. Plan to complete the most time-consuming and difficult tasks during your most productive time. Save less tedious or routine jobs for your "slow" time. Planning your day in this way helps overcome bouts of pressure, tension, and boredom and permits you to appreciate and enjoy your work more. It is not enough to know what is expected of you each day; you must also know what you are capable of accomplishing during the day.

4. There are three (3) major obstacles to good time management: priority switching, interruptions and office routines.

a. Priority Switching

Often caused by factors beyond your control such as equipment failure, emergencies/crises, etc. This is not cause to disregard your time management plan, as you should be prepared for such contingencies and move along your list and schedule to those tasks which you are able to complete during the interference. Several techniques can be utilized to control priority switching:

1.) group or consolidate tasks

2.) delegate jobs to co-workers doing similar tasks

As indicated before, it is good practice to clear your desk before leaving each evening. In the process of doing this, begin the "to-do" list you will refer to first thing the next day. Review what has been done, what needs to be finished and what should be started. Put them in order of importance, write them on the list, and put the list where it will be your first order of business the next day. Begin immediately at the top of the list, working down.

b. Interruptions

Tolerable in a trickle, aggravating in an avalanche! Control your interruptions. There are days when too many people march through your office, too many telephone calls jangle your nerves, too many visitors show up early or late for appointments. Your day can become chaotic. At the end of the day, you may feel that you have accomplished nothing. There is an exercise you may consider for tracking the interruptions you incur and how to control them. The "dot chart" is a pattern detector. If you use the dot chart each day for a two-week period, you will develop a visual comparison of planned work versus unplanned work. To employ the dot chart:

°Fill out colums as you need them: mail, phone, copying, boss interrupts, coffee, etc. Use one column for planned work.

°Put a dot in the proper column (next to the correct time) as each interruption occurs.

°Extend the dot downward as an interruption continues (a long phone interruption will become a line, not a dot on your chart).

°Continue for every interruption during the two-week period.

With hardly any work on your part, you will develop a series of dots that shows what really happens on the chaotic days full of interruptions. After a two-week period of dot tracking, you will realize that many interruptions are patterned--they occur regularly at certain times of the day. The dot chart provides you with visual evidence you can show to your boss or co-workers. Now you know where the interruptions occur, when they occur, and you will be able to control them or integrate them into your schedule.

Other interruptions to your day may be self-inflicted. Doing personal work, chatting with co-workers, making and receiving personal phone calls should be held to a minimum.

c. Office Routines

Helpful when essential, but wasteful when triggered by habit rather than need. Most of us accept office routines as inevitable--"It has always been done this way." For example, the method of mail distribution, phone call channeling, filing, record and time keeping, etc. All may be taking more time and energy than is necessary. You may have a better way of completing these routine tasks more efficiently, but because they have always been done a certain way, no effort is made to institute a more efficient way of handling. Knowing and accepting that the day is filled with routine, expected situations, it is important to adopt and adapt your plan of work for and with you--not against you. Proper planning avoids the stress of emergencies, relieves the pressure of last minute change and enables you to cope with situations you cannot anticipate or avoid.

Setting priorities helps you cope, organize your work day and aid your management of time effectively. Recognizing the daily interruptions and routines and being able to integrate them into your schedule will help you learn more effective ways of completing your required jobs.

After what may seem a laborious and time-consuming exercise, you have now:

°recognized goals and objectives

°established your past in achieving same

°listed your responsibilities

°broken them down into short-term, intermediate, long-term projects

°developed scheduling formats to incorporate the above

°recognized barriers which interfere with your schedules or plans

Now review your time management plan checklist. Could you save even more time by doing the following:

°delegate to others doing similar tasks

°relegate to an expert

°elevate to a supervisor

°eliminate as unnecessary

°consolidate similar tasks

°integrate consolidated tasks into more convenient time frames

°recuperate from hectic, rush jobs with less strenuous ones

°control interruptions and timewasters

°solicit help from co-workers to complete lengthy tasks

Employ these tactics as building blocks as you develop, adopt and put your plan of time management into operation. You will realize that good time management is like a game of dominos--when put into action, all the pieces will fall into place.

Dot Chart

Time							
9:00							
9:15							
9:30							
9:45							
10:00							
10:15							
10:30							
10:45							
11:00							
11:15							
11:30							
11:45							
12:00							
12:15							
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2:00							
2:15							
2:30							
2:45							
3:00							
3:15							
3:30							
3:45							
4:00							
4:15							
4:30							
4:45							
Total							

I want it yesterday. The copy must be in by Friday. Our deadline is the end of the month. Sound familiar? A comic schedule, called the Rush Job Calendar, has been invented to enable communicators to cope with unreasonable requests. The calendar contains seven extra days at the end of the month to meet deadlines, has no first of the month (to avoid bills), includes two Fridays each week and is organized so busy communicators can order their work on the seventh and have it delivered on the third. Fantasy — yes, but wouldn't it be nice? (Copyright 1980. Reprinted with persmission from EXECU-TIME®, the newsletter on effective use of Executive Time, published 24 times a year by JANUZ MARKETING COMMUNICATIONS, INC., 1370 Longwood Road, Lake Forest, Illinois 60045. Free sample copy upon request. Regular subscription price $48 per year.)

RUSH JOB CALENDAR

NEG	FRI	FRI	THU	WED	TUE	MON
8	7	6	5	4	3	2
16	15	14	13	12	11	9
23	22	21	20	19	18	17
31	30	29	28	27	26	24
38	37	36	35	34	33	32

1. EVERY JOB IS A RUSH. EVERYONE WANTS HIS JOB YESTERDAY. WITH THIS CALENDAR, A CUSTOMER CAN ORDER HIS WORK ON THE 7TH, AND HAVE IT DELIVERED ON THE 3RD.
2. ALL CUSTOMERS WANT THEIR JOBS ON FRIDAY . . . SO THERE ARE TWO FRIDAYS IN EACH WEEK.
3. THERE ARE SEVEN EXTRA DAYS AT THE END OF THE MONTH FOR THOSE END-OF-THE-MONTH JOBS.
4. THERE WILL BE NO FIRST OF THE MONTH BILLS TO BE PAID, AS THERE ISN'T ANY "FIRST". THE "TENTH" AND "TWENTY-FIFTH" ALSO HAVE BEEN OMITTED — IN CASE YOU HAVE BEEN ASKED TO PAY ON ONE OF THESE DAYS.
5. THERE ARE NO BOTHERSOME NON-PRODUCTIVE SATURDAYS AND SUNDAYS. NO TIME AND ONE HALF OR DOUBLE TIME TO PAY.
6. THERE'S A NEW DAY EACH WEEK CALLED — NEGOTIATION DAY.

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RUSH JOB CALENDAR

MON	TUE	WED	THU	FRI	SAT	SUN
2	3	4	5	6	7	8
9	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
32	33	34	35	36	37	38

TODAY

DATE_____

THINGS TO DO		FINISHED ✓
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

SPECIAL FOLLOW-UP		
1.		
2.		
3.		
4.		
5.		

TOPS FORM 2151 ®

LITHO IN U.S.A.

THINGS TO DO TODAY

Date: _____

Urgent ✓		Done ✓
☐	1.	☐
☐	2.	☐
☐	3.	☐
☐	4.	☐
☐	5.	☐
☐	6.	☐
☐	7.	☐
☐	8.	☐
☐	9.	☐
☐	10.	☐
☐	11.	☐
☐	12.	☐
☐	13.	☐
☐	14.	☐
☐	15.	☐
☐	16.	☐
☐	17.	☐
☐	18.	☐
☐	19.	☐
☐	20.	☐

NOTES

SCHEDULE OF ACTIVITIES

DATE _____
DAY _____

4:00a.m.	12:30a.m.
4:30a.m.	1:00a.m.
5:00a.m.	1:30a.m.
5:30a.m.	2:00a.m.
6:00a.m.	2:30a.m.
6:30a.m.	3:00a.m.
7:00a.m.	3:30a.m.
7:30a.m.	4:00a.m.
8:00a.m.	
8:30a.m.	
9:00a.m.	
9:30a.m.	
10:00a.m.	
10:30a.m.	
11:00a.m.	
11:30a.m.	
NOON	
12:30p.m.	
1:00p.m.	
1:30p.m.	
2:00p.m.	
2:30p.m.	
3:00p.m.	
3:30p.m.	
4:00p.m.	
4:30p.m.	
5:00p.m.	
5:30p.m.	
6:00p.m.	
6:30p.m.	
7:00p.m.	
7:30p.m.	
8:00p.m.	
8:30p.m.	
9:00p.m.	
9:30p.m.	
10:00p.m.	
10:30p.m.	
11:00p.m.	
11:30p.m.	
MIDNIGHT	

CALLS TO MAKE

THINGS TO DO

REFERENCE		TIME DUE	

13 SUNDAY
SEPTEMBER, 1981 • 256th Day, 109 Days Left

APPOINTMENTS & SCHEDULED EVENTS		DIARY RECORD
	8	
	9	
	10	
	11	
	12	
	1	
	2	
	3	
	4	
	5	
	6	
	7	
	8	
	9	

TO BE DONE TODAY (NUMBER EACH ITEM)	EXPENSES

DAY-TIMERS, IN U.S.A., BOX 2368, ALLENTOWN, PA. 18001 • IN CANADA, 1975 KENT AVENUE, BOX 1028, NIAGARA FALLS, ONT. L2E 6X6 • IN UNITED KINGDOM, 24A BARTHOLOMEW VILLAS, LONDON NW5 2LY

NOTES & MEMOS

AUGUST 1981

SUN	MON	TUE	WED	THU	FRI	SAT
8th MONTH						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

SEPTEMBER 1981

SUN	MON	TUE	WED	THU	FRI	SAT
9th MONTH		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

OCTOBER 1981

SUN	MON	TUE	WED	THU	FRI	SAT
10th MONTH				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		31

17 THURSDAY

SEPTEMBER, 1981 • 260th Day 105 Days Left

APPOINTMENTS & SCHEDULED EVENTS		DIARY RECORD
	8	
	9	
	10	
	11	
	12	
	1	
	2	
	3	
	4	
	5	
	6	
	7	
	8	
	9	

TO BE DONE TODAY (NUMBER EACH ITEM)	EXPENSES

FAX TIMERS IN U.S.A. BOX 2360 ALLENTOWN, PA. 18001 • IN CANADA 4615 KENT AVENUE, BOX 1078 NIAGARA FALLS, ONT. L2E 6X8 • IN UNITED KINGDOM 74A BARTHOLOMEW VILLAS LONDON NW5 2LY

APPOINTMENTS & SCHEDULED EVENTS		DIARY RECORD
	8	
	9	
	10	
	11	
	12	
	1	
	2	
	3	
	4	
	5	
	6	
	7	
	8	
	9	

TO BE DONE TODAY (NUMBER EACH ITEM)	EXPENSES

DAY TIMERS, INC. U.S.A.—BOX 1360, ALLENTOWN, PA. 18001 • IN CANADA—457 KENT AVENUE, BOX 1020, NIAGARA FALLS, ONT. L2E 6X6 • IN UNITED KINGDOM—24A BARTHOLOMEW VILLAS, LONDON NW5 2LY

DATE _____

APPOINTMENTS & SCHEDULED EVENTS		RECORD
	8	
	9	
	10	
	11	
	12	
	1	
	2	
	3	
	4	
	5	
	6	
	7	
	8	
	9	

TO BE DONE TODAY (NUMBER EACH ITEM)	TO BE DONE

TO DO TODAY

NAME: _____ DATE: _____

PRIORITY	TASKS	DEADLINE	ESTIMATED TIME	RESULTS & ACTUAL TIME USED

PEOPLE TO SEE/DISCUSSION TOPICS

PHONE CALLS (name, purpose)

LETTERS/REPORTS TO WRITE

LONG RANGE (task, when due)

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TIME LOG

NAME _____ DATE _____

HOURS	PROJECTS & ACTIVITIES												COMMENTS
AM													
7													
8													
9													
10													
11													
NOON													
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
TIME SUMMARY													

Instructions: Each 5, 10, or 15 minute interval (by the clock), place a ✓ in the column that best describes your activity.

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SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY

FEBRUARY - MARCH

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
9 8:30 John LaFe...n letters out to consultants and participants · dg/cd 10:00 Diana Kerr · jmh Post office · jmh send cert. to HAS · dg	10 agenda final · cd type agenda · dg write case study cont. · cd 2:00 MRC study · lst 4:00 credit union · jmh jmh · p.o's	11 follow-up w/ DSS · cd send case study mfo. to RH. 12:30 MFA / epf. call Biondi re: RFP's · cd LIBRARY	12 letter to Foster & Vogel · cd agenda to hotel · cd 1:00 R. Roman · Library MANUALS ★ time sheets due	13 newsletter to X · jmh 9:30 B. James · Library MRC study · lst order supplies · dg 2:30 staff mtg.
16 HOLIDAY	17 OFC hearings re: standards RSB file · jmh/dg 10-12 MCHSP/OFC 3:00 Rosalee Hermens lst - out / MRC jmh · p.o.s.	18 LST Agenda · trng for trainers JJAC mtg. 1:00 K. Libertoff / D. Kerr · jmh LIBRARY	19 Harvard Club • $ corps. trng. finalize JJ system agenda · cd	20 newsletter to printer · jmh MRC study · lst all day 12:00 Doug Baird · ADC's $ 2:30 staff mtg.
23 pre/post test · jmh participant list to hotel · cd	24 faculty roster · dg 4:30 Dozens · jmh / lst jmh · p.o.'s	25 Institute Prep. ★ JJ system material to dg · jmh LIBRARY	26 Institute Prep. ★ newsletter back from printer · jmh partic. roster do 5 day schedule · cd MANUALS	27 assemble manuals · lst / dg. 2:30 staff mtg. dg-out early mailing log · dg order supplies · dg time sheets
2 ★ Worcester 5 day mail newsletter · dg prepare agendas for 3/25+26 · dg send confs. to consultants · dg.	3 ★ Worcester 5 day jmh · p.o.'s	4 ★ Worcester 5 day LIBRARY	5 ★ Worcester 5 day prepare JJ system in Mass. book · dg.	6 ★ Worcester 5 day Monthly due · jmh $
9 5 day evals · jmh type s.p.g. reports · dg part · chorac. · jmh.	10 participants / mfo. Trng. for Trainers · cd/dg. jmh - p.o.'s	11 5 day narrative · cd LIBRARY	12 accept JJ system in Mass. participants · dg/cd send confs. MANUALS	13 finish clean up for Worc. 5 day! 2:30 staff mtg. dg-out all day time sheets

1982 PLANNING CALENDAR

DATE	JANUARY—DATE EACH ITEM

DATE	APRIL—DATE EACH ITEM

DATE	FEBRUARY—DATE EACH ITEM

DATE	MAY—DATE EACH ITEM

DATE	MARCH—DATE EACH ITEM

DATE	JUNE—DATE EACH ITEM

1982 PLANNING CALENDAR

DATE	JULY—DATE EACH ITEM

DATE	OCTOBER—DATE EACH ITEM

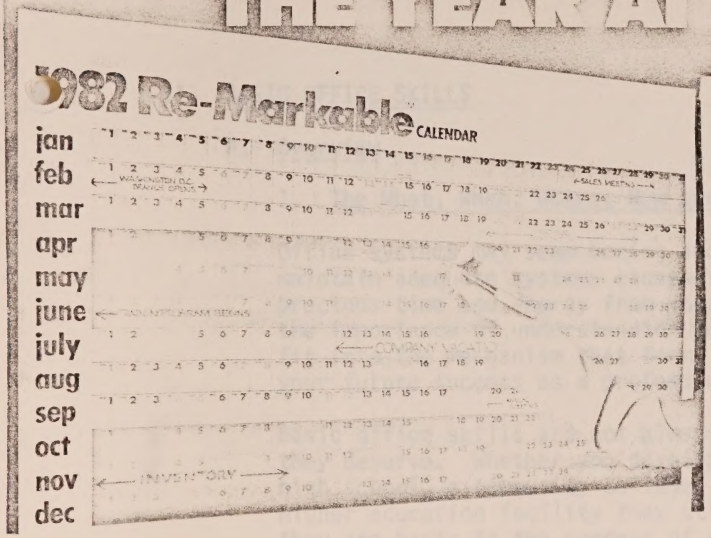
DATE	AUGUST—DATE EACH ITEM

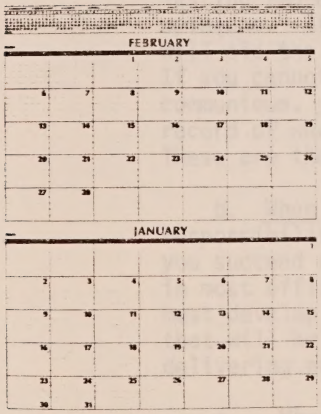
DATE	NOVEMBER—DATE EACH ITEM

DATE	SEPTEMBER—DATE EACH ITEM

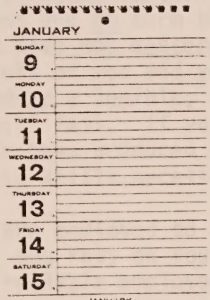
DATE	DECEMBER—DATE EACH ITEM

THE YEAR AT A GLANCE

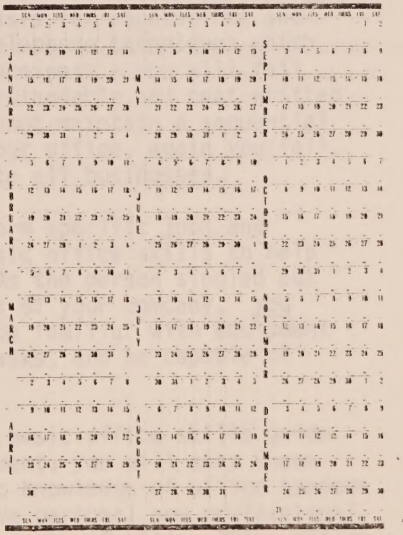




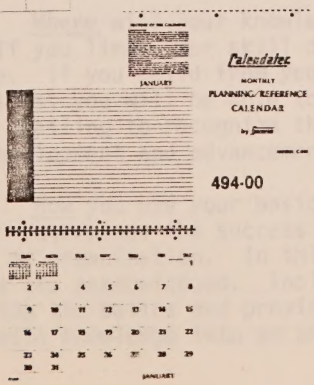
1022-0



1252-0



1092-0



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1032-0

II. BASIC OFFICE SKILLS

A. Overview

1. The What, When, Where, How and Why

Office systems may seem boring and unimportant, but failing to maintain adequate systems causes inefficiency which steals precious time and energy from your daily work schedule. Ignoring the importance of understanding your basic skills and how they fit into the mechanism that forms your office systems threatens your future success as a professional.

Basic office skills are not always viewed with the importance they deserve. Whether you developed your basic office skills in high school, a community college, a secretarial school or other higher education facility they still maintain one common trait: they are basic to the success of all businesses.

a. What are basic office skills? The ability to complete any required task which will produce the service your office is expected to render, is accomplished through the employment of basic office skills. Everyone possesses these - in varying degrees. Foremost is communication skills. First impressions are lasting impressions and do form the basis for reputations and opinions. If you have not mastered telephone techniques which will aid the success of you and your business - you will fail. If you cannot produce a legible, understandable and neat written communique, you will fail. If you cannot maintain a sequential record of what has been produced by your office, again you fail. These are the basic skills necessary to all businesses.

b. When you are employed to perform specific jobs and responsibilities, you rely on your basic office skills to help you succeed as a reliable employee. As the person singled out in most offices to produce the results of your company, you must develop good telephone manners, be familiar with equipment that will help you do your assigned tasks, and be capable of delivering professional results.

c. Where will your knowledge of basic office skills guide you? If you limit your skill development, you will stay where you are. If you build from your basic knowledge of office systems and skills, you will be able to achieve personal and professional goals. Failing to recognize the importance of basic office skills as a development and advancement tool will leave you nowhere!

d. How you use your basic knowledge, skills, abilities and talents determines the success of you and your office, department, agency or organization. In this section, basic office skills and systems are acknowledged. Included are tips and techniques for improving the basics and providing you with a course to develop your basic knowledge into an area of expertise. How professional

you envision yourself to be is only as realistic as how well you learn from daily routines, other people, personal experiences, etc. Beginning with the basic tools and being able and willing to capitalize on them determines the level of success.

e. Why are basic office skills important to you? To the success of your business? It should be obvious, as has been stated so often, that the success of any business is measured by those people who are responsible for producing the service being rendered. This product, as it relates to human services, is the manner in which we communicate orally or in writing. Throughout this manual there is an emphasis placed on achieving established or desired goals. To attain any goal, you must begin with basic knowledge or skills. To experience success in any office, you must be aware of basic office skills and how they will be your tools toward achieving ultimate success.

Although there are many other basics which may be universal, we have concentrated in this section on those skills which are most pertinent to any operation. Telephone mannerisms, techniques and tips are meant to promote a positive image to the public with whom you must interact daily. Learning to know and use the equipment necessary to your work, such as the typewriter, cannot be overlooked as unimportant. Every office maintains some form of recordkeeping. Knowing various systems from simple to elaborte will allow you to know which is best suited to your needs. Other forms of communication are more specific. These are the methods of communicating between you and your boss. Knowing how to accept the instructions or information (dictation) given and then how to transmit it to others (transcription) in a legible form (composition) is a vital aspect of office procedures and skills. Finally, being able to submit a final product (a letter or a report) is your way of showing how well you use your knowledge of basic office skills.

As you review the following information and apply it to your level of skill, consider how these skills relate to the plan you have adopted for better management of your time. Success will not be the end result if you do not employ a plan for using your time most effectively and most efficiently. Efficient use of time cannot be accomplished without employing the essential yet basic office skills you possess.

B. Telephone Techniques/Tips

Every office has a telephone which rings, rings, and rings. It is the link between a business' profit or success. It is the cause of most interruptions and interferences of time use. How the telephone is used is an important element of your daily operation.

1. Answering the Telephone - Everytime you answer the telephone you are projecting the image of your organization; to the caller, you are the organization. You must depend on your voice to project a pleasant, business-like attitude and to give the caller your full attention. Be conscious of the tone of your voice and the attitude it projects. Both what you say and how you say it are important to your success and the success of your organization.

   a. Answer promptly, but avoid surprising the caller by answering too soon. Letting the telephone ring while you complete a project or finishing a conversation with a visitor is annoying to the caller, discourteous, and inefficient. Under no circumstances should you lift the receiver and let the caller wait while you finish a conversation with someone in the office.

   b. Identify yourself and let the caller know they have reached the right office. NEVER answer a business telephone with "Hello," or using only initials such as "MCHSP." And although it is **not** common practice, answering a telephone by repeating your telephone number does not indicate to the caller that they have reached the party they intended.

   c. Be courteous. A greeting such as "Good morning" or "Good afternoon" is a courtesy many callers expect. It is not only a form of greeting, it also serves two other very important roles. A plesant greeting disarms the irate caller and is appreciated by others. Also, many callers do not hear the name of the organization if it is the first word(s) spoken.

   d. Listening carefully is essential to effective telephone usage. If the caller interrupts you, permit them to talk; however, if the caller has reached the wrong office or number, make them aware before they complete a long explanation draining your time.

   e. Putting calls on hold cannot be avoided. What must be controlled is the time people are made to wait for their connection. Be sure to ask if the caller is willing to hold or would they prefer to have the call returned. If the caller indicates they will wait a short time, make sure it is short and always return to the line to advise them whether the call

must still wait. DO NOT PUT A CALL ON HOLD AND FORGET OR IGNORE IT. Holding a silent telephone is not only wasting very valuable time, but it is very exasperating to the caller. Return to the waiting call at least every 30 seconds to assure the caller they are being taken care of and not forgotten. Not only is this a matter of courtesy, but it promotes public relations for your office and reflects the concern you show for your position.

When responding to a caller who has been on "hold," identify yourself when you answer. The caller may not know immediately that someone else is now on the line. It is helpful to say, "Thank you for waiting; this is Mary Jones," or "Sue Smith speaking; may I help you." Allowing the caller the privilege of addressing you by name puts the entire atmosphere of the call on an equal and friendly basis.

Another forbidden technique: NEVER SIMPLY COVER THE TELEPHONE RECEIVER WITH YOUR HAND TO ANNOUNCE A CALL TO SOMEONE. This is not professional. If you do not have a hold button or if your hold button is not in service, balance the handset face-down on the desk, using a book or paper as a cushion. Then go and tell the person a call is waiting.

It must also go without saying that a person should be advised that they are being put on hold. How many times have you called a number, asked for the person you are calling and never having been told, "One moment, please. I'll put you on hold," or "I'll put you on hold and the person will be right with you"?

f. Take complete and accurate messages. Always keep a note pad and pencil or pen by the telephone. Avoid having to ask the caller to wait while you look for a piece of paper or pen. This wastes your time, wastes the caller's time, and promotes a picture of inefficiency to the caller. Be ready to write before you pick up the telephone receiver.

Another disconcerting timewaster is making a mistake on a message. "The name sounds like," or "I forget what company he called from," or... Repeat the caller's name, number and message to assure both yourself and the caller that you've recorded it accurately.

If you are the caller and wish to leave a message, help the person on the other end by saying, "May I leave a message and have the called returned? My name is..., my number is..., and I'll be available until 3 p.m." Don't assume the person answering the call will take down all the necessary information. This saves time and insures that your message is recorded and accurately recorded.

Also, when you are calling someone, identify yourself — this saves time. "Good morning, this is Susan Jones. Is Bob Smith available?"

g. Discretion and confidentiality of telephone calls cannot be over-emphasized. Callers who are well known may make flippant or banal remarks if your boss is out of the office (for example, "Oh, she's out fooling around again," or something similar). While you may remain polite and share the levity of the caller, do not be the instigator of snide remarks about your boss or coworkers. Be prepared to say your boss is out of the office and is expected at such a time. NEVER SAY, "I DON'T KNOW WHERE HE/SHE IS." Being honest and simply relating that someone is out of their office and expected shortly is discreet and does not show your disconcern or ignorance.

Respecting the confidentiality of your office is important while talking on the telephone and relating information requested by a caller. Be cautious that you are not revealing information of a sensitive nature; do not fall into the trap of a caller stating that your boss instructed the caller to get the information from you — and you not being aware of it or prepared by your boss. Politely indicate that you will have to look for the information and be happy to call back. Then immediately verify that you are permitted to reveal the information requested.

h. Suggestions for answering the telephone when your boss is away from the office:

"------- is away from his/her desk at the moment. May I take a message and have the called returned?"

"------- is out of the office and is expected to return late this afternoon. Will you available at that time to have the call returned?"

DO NOT SAY:

"------- is in Denver." (simply saying "out-of-town" is sufficient)

"------- is playing golf this afternoon."

"------- has not returned from lunch." (implies that your boss has overstayed)

"------- is busy." (shouldn't they be busy all the time? not enough information/too brusque)

"------- hasn't come into the office yet today." (implies tardiness)

"------- is not taking calls at this time." (may be true, but impolite)

"------- is not available." (not enough information/too brusque)

"------- is in conference." (overused, better to say that your boss is in a meeting and state the time you expect your boss to return)

i. Screening calls is a normal practice in the office and is practiced to save your boss' time — your time — as well as to assist the caller. Screening calls allows you to handle calls you are equipped to handle immediately, rather than second-handedly. Screening also saves time if the call has been misdirected. The more knowledge you gain about your office and the organization, the easier your job of screening calls will become and the more proficient you will be in your work.

Several ways of screening calls include:

"-------'s office. ------- is out of town today, perhaps I may be able to help you."

"This is -------, -------'s assistant/secretary. ------- is in a meeting/on another line/out of the office at the at the moment. May I help you or take a message to have the call returned."

Screening calls may be bothersome to some callers who want to speak immediately and directly with the person they are calling. Your voice and manner of responding to the call will cool a potentially volatile caller and set the mood for a more cooperative exchange.

Before answering the telephone, however, you must know:

1) the correct manner of identifying you and your office
2) if your boss is available
3) if not, why not and when will your boss be available

When answering the telephone, you must:

1) identify yourself, your office
2) indicate availability of person being called
3) take message or help the caller

NEVER ask who is calling before indicating whether your boss is available. This presents the caller with the impression that the calls are being screened to avoid having certain calls placed to the boss.

When you become familiar with your job, you will become familiar with those people and types of calls which are frequent to your job. Once you become acquainted with frequent calls, you will be able to determine which calls are to be screened and how to approach difficult situations. You will also become aware of calls from people who are not known to your boss. Screening and ascertaining the reason for such calls is not only polite and appropriate, it will again save everyone's time. By determining the nature of a call, you may be able to handle it yourself; direct the caller to a more appropriate office; or prepare your boss to handle the call by supplying data, files, materials or other information while he/she is on the telephone. An easy way of handling such calls:

"-------'s office. (Indicate that your boss is in.) May I say who is calling, please. (if it is an unfamiliar caller) May I also say the nature of your call."

Unfortunately, there will always be those callers who are insulted by being confronted by the secretary or assistant and become offensive when asked if you can be of service. Those callers will say "NO" to a secretary's question, "May I help you?" Try a new approach, say "How may I help you?" This implies that you are capable of helping the caller during your boss' absence. At all times, you must remain calm and polite. If the caller insists that you are not capable of handling the call, then simply say that you will be happy to take a message and have your boss return the call at the earliest opportunity. Make your boss aware that your attempt to help the caller was thwarted. Your boss will handle any recriminations by the caller. It is important that you make your boss aware of this so that the caller will not embellish or exaggerate the confrontation and state that you were not helpful.

j. Your telephone personality is one of the most important assets to you, your office and your organization. Your voice personality is the "welcome mat" to your business. Being greeted with an "I'm so happy you called" voice makes business easier to transact and relieves any inhibitions the caller may have had and softens angry callers. To help you maintain a "happy" personality, smile when you answer the telephone. It may sound foolish, but the smile will help you convey a welcome to the caller. The voice with a smile says all the right things about you and your organization or agency.

OTHER WAYS TO SAVE TELEPHONE TIME

- Record the best time of the day or week to get through to the people you call on a regular basis.

- Before making a call, quickly jot down the points you want to bring up so you won't forget anything.

- Arrange call-backs in order of importance in case you are interrupted before you finish.

- If the person you are calling is not available, try to get the information you need from someone else, rather than leaving a message.

- Don't allow yourself to be put on "hold" unless you can do routine work while you wait. Otherwise, leave a message.

- If feasible, install touchtone telephones. It takes at least four times as long to dial using the conventional rotary dial telephones.

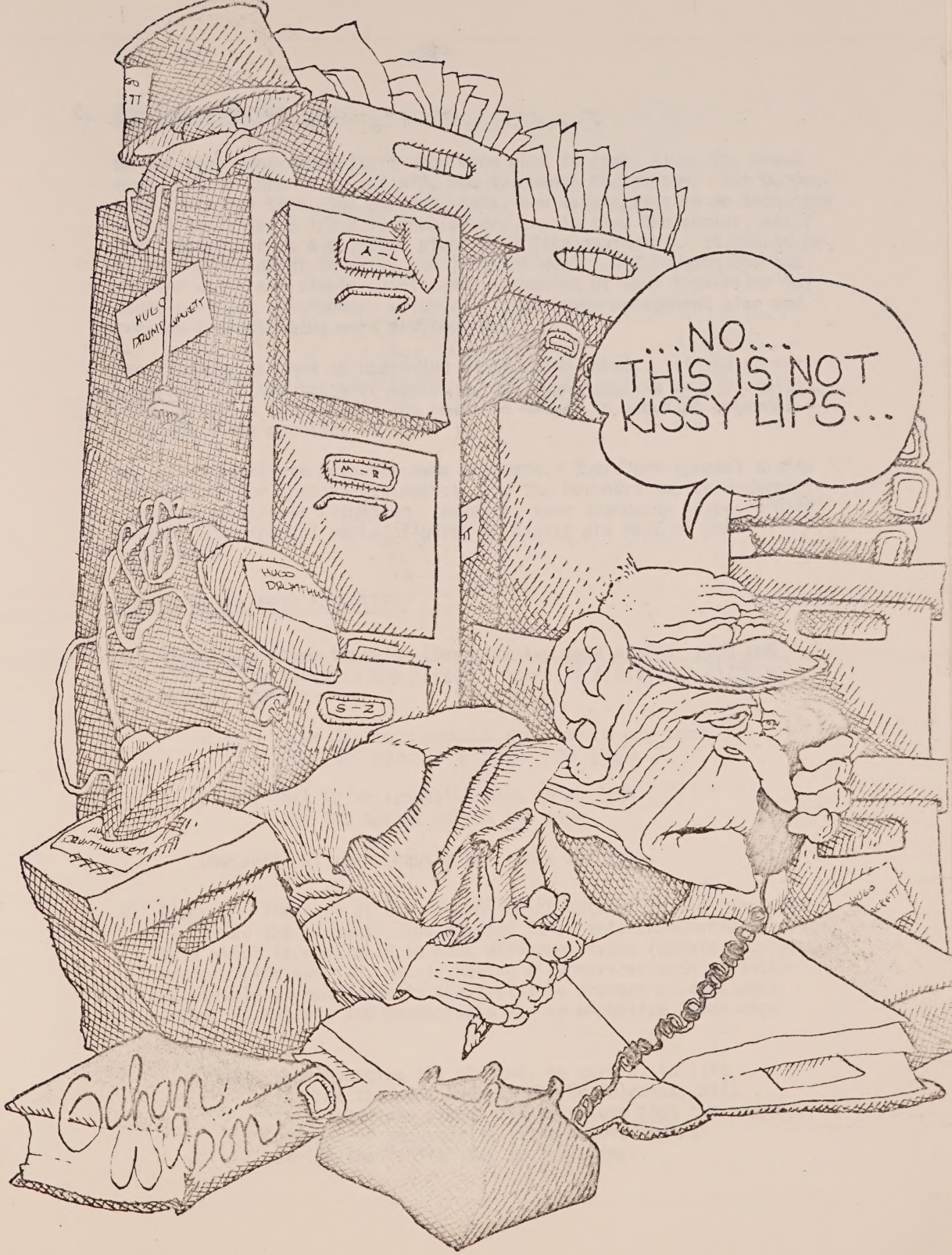
- End the conversation once the objective has been reached. Examples:

  "Thank you, Sam. I don't need to keep you any longer."

  "Thank you for your help, Mr. ------."

  "I have another call waiting. Thank you for everything."

  "Thanks so much, Jill. I'll talk to you later."


...NO... THIS IS NOT KISSY LIPS...
A-L
A-R
S-Z

C. The Typewriter and You

Do you know your typewriter? You know what it looks like, its brand name, how to turn it on and off, how to change the ribbon. But do you know the pitch type, the element style, how many spaces to an inch, how many lines on an 8 1/2 x 11 inch paper, how to find the center, etc.? Your typewriter is a valuable piece of office equipment. It should be treated with respect to serve you long and well. Not knowing how the machine works and simple maintenance mechanics of your typewriter may cause constant breakdowns, which ruins your time management plan and creates a frustrating work environment.

Every typewriter has an operating instruction manual. If you do not have one, the manufacturer would be more than happy to supply copies. Find, or get a copy of it, and read the manual to acquaint yourself with the whole machine.

Not all typewriters have the same keyboard. There are special digits and letters for special businesses, and the keyboard may be ordered for that particular situation. However, even standards keyboard vary so know what special marks, figures or digits are part of your typewriter.

RULES YOU MAY HAVE FORGOTTEN

1. Pitch Type (type sizes) - There are two type sizes: pica and elite. The first is the larger. There is a distinct difference between them.

   Pica: has 10 horizontal spaces to an inch
   has 85 spaces across the page

   Elite: has 12 horizontal spaces to an inch
   has 102 spaces across the page

   One vertical inch equals six lines for both.

2. Element - The part of the machine which determines the type used is called the element. The element is an interchangeable spherical ball which is available in many different types (gothic, script, orator, olde english, etc.) Having a typewriter with an interchangeable element permits the typist to prepare professional appearing reports and manuscripts and to emphasize items more prominently.

   TIP: When changing the element, be careful to lift it from the post and replace the element until it clicks into place. To make sure that the element is securely in place before typing, strike the "shift" key several times.

3. Repeating Keys - Many typewriters have the built in convenience of several well used keys being "repeating keys." They are:

space bar	backspace	hyphen
underscore	carriage return	period
index	correcting key	

4. Centering - Everyone at some point must center a title or a line in a letter or report. There are several ways of doing this and once learned, centering becomes automatic, quick and easy.

   a. The center of your paper: # of spaces across the paper ÷ by 2 = the # of spaces to space across from the left edge of your paper = center.

   b. The center of your paper: fold the paper in half, open it, and mark the center.

   c. Centering a title: backspace once for every two letters and spaces in the title.

```
CENTERING A HEADING
V V V V V V V V V V
1 1 1 1 1 1 1 1 1 1     = backspace 9
```

   d. Centering a title: count the letters and spaces of the line or title and divide by 2 and backspace that number.

```
CENTERING A HEADING
1111111111111111111
```

   19 ÷ 2 - 9.5

   Since the letter and spaces of the example heading in c & d are not divisible evenly, consider the lowest whole number or 9 as the measure for centering.

   e. Centering vertically: there are 66 lines on a 8 1/2 x 11 inch piece of paper. Count the number of lines to be typed, including the spaces between, divide by 2 and add 1. Space down that far and start typing.

5. Tabulating - Tabulating and the keys involved (clear "clr," set and tab) aid the typist in preparing columnar work, for indenting paragraphs and for indention of material which is being emphasized, and for standard lines of type (signature, date, etc.).

   TIP: If the typing you perform is primarily correspondence, tabs should be set for the most frequently used items of correspondence - date, reference/subject, paragraphs, closing/signature.

TIP: To clear tabs after having done a lengthy columnar project, simply move the element carriage to the far right of the machine and either strike the "return" or the "exp" or the "rapid" (express and rapid return on the same line) keys at the same time depressing the "clr" key. Tabs will be clear and ready to be reset. (Not all typewriters have this ability.)

6. Correcting Errors - Make every effort to proofread your typed work before removing the paper from the machine. It is more time consuming if you have to reinsert the paper into the machine and make the correction. However, there are methods of correcting errors that will help make a presentable finished copy.

   a. Discover error when the paper is still in the machine:

      (1) use built-in correcting tape

      (2) erase the error

      (3) use liquid to paint over the error

   b. Discover error after removing the paper from the machine:

      (1) erase or paint over the error, reinsert the paper in the machine, use the markings on the cardholder to realign characters, and type. (The cardholder is the clear plastic item behind your element and touching the paper. The red line in the center of the cardholder aligns with the center of the characters. See your typewriter instruction manual for further information.)

      (2) reinsert the paper in the machine, use the cardholder to realign characters, and use the built-in correcting key to correct.

      (3) if you do not have a cardholder to align characters after you reinsert the paper, move your carriage to the very end of the typed line (one space after the last letter of the typed line), strike any letter to compare it for alignment, adjust the paper in your machine if you need to, then type the correction.

   c. "Squeezing" or "Spreading" the correction - If the error is not only in spelling, but having struck too many or not enough letters for the space involved, you must "squeeze" or "spread" the correction.

(1) Squeezing corrections - Erase the error, paint it over, or use the correcting key. Align the carrier where the first letter of the error was. Move the Half-Backspace key/lever toward you until the red vertical line on the cardholder indicates the desired typing position. To move exactly one-half space, pull the lever as far as it will go. Type the correction. When the lever is released, the carrier will move forward to its normal position.

(2) Squeezing corrections - Erase the error, paint it over, or use the correcting key. Align the carrier where the first letter of the error was. If you do not have a Half-Backspace key, push the carrier to the left only slightly - not enough to move it a whole space - with your hand. Most machine carriers will move with a little pressure being applied. Now type your letter and space. Repeat this maneuver for the whole word until you finish and it fits in the limited space provided.

(3) Squeezing corrections - Erase the error, paint it over, or use the correcting key. Align the carrier where the first letter of the error was. If you do not have a Half-Backspace key and wish not to move your carrier, pull the paper release toward you and shift your paper until the red line on the cardholder is in between letters. Close the paper release and type the correction. After you have typed the correction, pull the paper release and align your paper to its correct position.

(4) Spreading corrections - use the same methods discussed in 1, 2 and 3; ONLY align the carrier where the second letter of the error was and then use Half-Backspace key, move the carrier with your hand, or shift the paper to the left.

(5) Spreading corrections - Erase the error, paint it over, or use the correcting key. Simply type the correct word; the extra space will not be noticeable.
Example - The coook made salad. The cook made salad.

IMPORTANT - Squeezing or spreading a word with more than one excess letter or more than one missing letter may cause attention to be drawn to the spot. Use your own judgment in spacing an error involving more than one letter.

All-in-all, your typing chores can be made less tedious with proper planning and use of the time allowed and full knowledge of the typewriter you have available. Pre-planning of the material will avoid errors and time wasting. Remember that when you do not properly plan and must redo your work, the task is still undone, the time allotted is used; and other work is accumulating. Planning will avoid these costly wastes of your time.

PROOFREADING TIPS

1) Read each word letter by letter, not word by word or phrase by phrase as you might normally.

2) First, scan for overall appearance. Is your spacing correct? Are the margins correct? In checking the overall design of what you've typed, you ensure that the image of your company and you is first rate.

3) Proofread the copy for meaning. At the same time, watch for typographical, spelling and punctuation errors.

   ***typographical errors usually never come singly

4) Do not retype a page if you can make corrections which are not detectable. Use squeezing or spreading and other correcting techniques.

5) Go over the copy a second time, scanning it in search of figures, such as dates and amounts of money.

6) Use an adding machine or calculator to check a list of typed figures which have been totaled.

7) When a long series appears in a paragraph, count the items and compare the number with the list in the original. Also count the items included in a tabulation.

8) When you are proofreading line by line, use a ruler to keep your place.

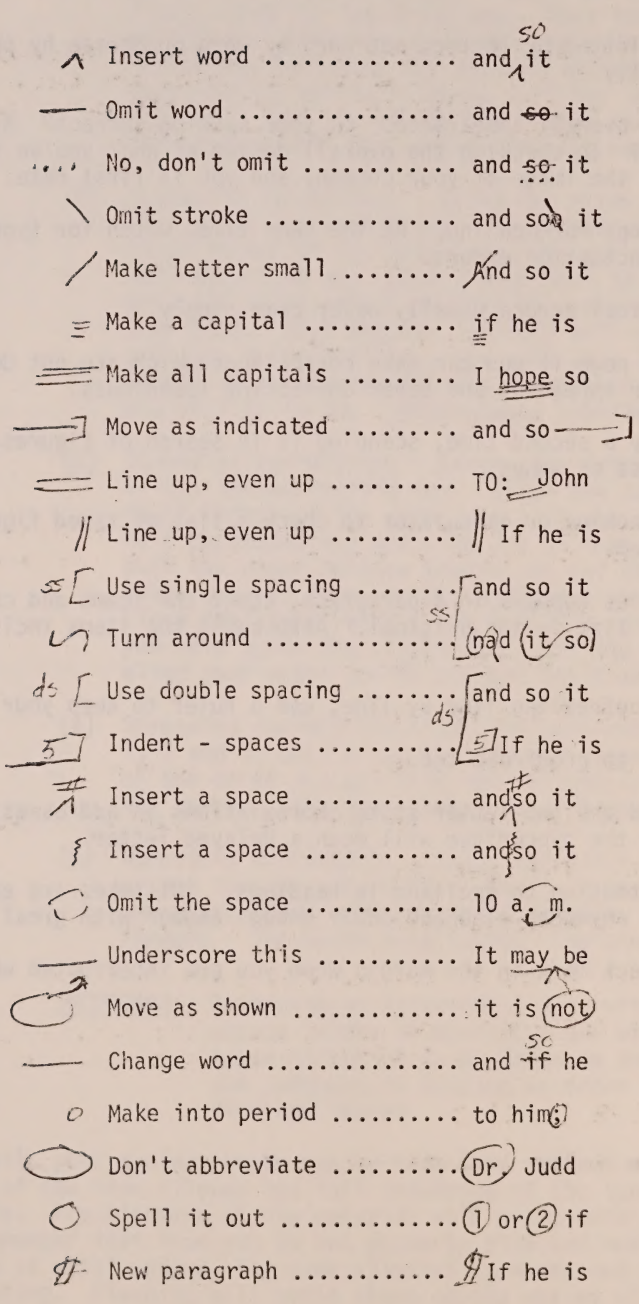
9) Ask a co-worker to proofread too.

10) Always proofread the two-letter state abbreviations in addresses. One wrong stroke at the typewriter will mean a delayed letter.

11) Give special attention to spelling in headings. Mistakes are easier to miss there than anywhere else and oddly enough appear with great frequency.

12) Use a pencil check mark in the margin when you are interrupted while proofreading.

PROOFREADER MARKS



Triple-Spacing

Triple-spacing means leaving two free spaces between lines. Triple-space after titles, and above and below the main headings in a manuscript. In the illustration below, the check marks indicate the "skipped" lines in a triple-spaced list.

Chicago

Los Angeles

New York City

USING PUNCTUATION MARKS

Use a Period

. . . at the end of a sentence that tells something, gives a command, or makes a request (follow with two spaces).

He went to see the dentist.

Pick up your things.

May I use your pen.

. . . as a decimal point (do not space around it).

. . . after divisions of an outline (follow with two spaces).

A. The Open Sky

. . . after an abbreviation or initial (follow with one space).

Mr. Henry T. Putnam will be here soon.

EXCEPTIONS: Do not space after periods in the following: a.m., p.m., c.o.d., etc.

Do not Use a Period or Space

. . . in the abbreviations FBI, SEC, CIA, MIA, POW.

Use a Period

. . . to make leaders in an ellipsis (space once before and after).

The woman . . . took her place in the room.

(Use three leaders to indicate words left out. Precede and follow each leader with a space. Add a fourth leader for a period at the end of a sentence).

. . . to separate dollars and cents (no spacing around decimal).

$3.15

Use an Apostrophe

. . . to indicate possession with a noun.

To indicate the possessive of a singular noun, first write that noun--then add an apostrophe and s.

Fred Fred's

To form the possessive of an already plural noun, simply add the apostrophe and s.

men men's

If the plural does end in s, add only an apostrophe.

ladies ladies'

For joint ownership, use the apostrophe with the last name only.

Jim and Jean's cat is missing.

To show separate ownership, use the apostrophe with each name.

Amy's and Helen's dogs are missing.

To show possession with the indefinite pronoun, add an apostrophe and s.

one--one's another--another's

. . . if the indefinite pronoun is followed by else, that word gets the apostrophe.

Someone else's hat is hanging here.

. . . with expressions of time, space, and amount.

He bought a dollar's worth of candy.

. . . to show letters omitted within words. Place the apostrophe where the letter or letters were omitted.

He will be playin' his banjo 'till dark.

. . . to indicate the plural of letters, numbers, and signs referred to as words.

His o's all look like a's.

There are four 8's in that number.

. . . to indicate a contraction.

It's time to go to the party.

Do Not Use an Apostrophe

. . . in the possessive personal pronouns (its, his, ours).

It is ours to use.

Use a Hyphen (leave no space before or after)

. . . to separate compound numbers between twenty-one and ninety-nine.

I borrowed thirty-one dollars from him.

. . . to separate two or more words that form an adjective before a noun.

She has a baby-innocent look to her face.

. . . within a compound noun consisting of the noun and prepositional phrase.

mother-in-law partner-in-crime

. . . to separate a compound adjective, the last word of which is capitalized.

His behavior and speech are quite un-American.

. . . to separate the words ex and elect when they form part of a title.

The ex-president has arrived.

. . . to divide a word by syllables when it must be separated at the end of a line.

. . . to indicate fractions in word form.

Only one-third of the class passed the test.

Use a Comma (no space before, one space after)

. . . to separate words in a series.

Mother bought bananas, apples, peaches, and pears.

. . . before a direct quotation.

Jay said, "I know of two possible solutions."

. . . before words that convert a statement into a question.

We surely are lucky, aren't we?

. . . to separate an introductory dependent clause from what remains in the sentence.

If you feel depressed, count all your blessings.

. . . following a participial phrase which initiates a sentence.

Feeling bored, I decided to drive around town.

. . . to separate co-ordinate adjectives preceding a noun.

The cold, clear, swift river was navigable by canoe.

. . . to separate non-essential elements.

This athlete, by the way, comes from Illinois.

. . . before a conjunction that connects independent clauses in a compound sentence.

Jean leaves immediately, but Jim will go later.

. . . to separate a noun in direct address.

Joyce, your boss wishes to see you.

. . . to separate the parts of an address in a sentence.

This goes to Carol Wills, 222 Douglas Avenue.

. . . to separate the parts of a date.

On February 10, 1970, we had a severe sleet storm.

. . . to separate introductory words (yes, no, oh, of course) from the rest of the sentence.

Yes, do take the money. Oh, I almost forgot it.

. . . to enclose an appositive unless it is closely identified with the word to which it pertains.

Smoky, my dog, loves to hunt.

The year 1945 will never be forgotten by servicemen.

. . . following the salutation and complimentary close in a personal letter, and following the complimentary close in a business letter.

Dear Amber, Yours truly, Sincerely,

. . . to separate a series of words or phrases or clauses.

Sue took along two pencils, three pens, and a ruler.

I looked in the garage, in the shed, and in the barn.

Bob is hunting, Fred is reading, and Tom is sleeping.

. . . to set off dates and to separate city and state.

She was born in Portland, Maine, on October 21, 1970.

<u>Use the Dash</u> (two hyphens together with no space involved)

. . . to indicate sudden change in thought.

I will work--I will die--for this cause.

. . . as a summarizing thought or afterthought at the end of a sentence.

I will draft the copy, write it over with corrections, polish it up--give all the assistance I can.

. . . to separate the emphasized.

He will go to one game--one game only--while we are visiting in this city.

Use an Exclamation Mark

. . . to show strong emotion (follow with two spaces).

Is he sunburned! Put out that fire!

Use a Question Mark

. . . at the end of a sentence that asks a question (follow with two spaces).

Has she arrived yet?

. . . after each part of a sentence which contains more than one question (follow with one space until the one that ends the sentence, and then use two spaces).

What can you say about his ability? his personality?

Use a Semicolon

. . . between two or more independent clauses of a compound sentence (not attached by conjunctions like and, or, nor).

I called; no one answered.

Bob is short; so is Stan.

. . . before such coordinate conjunctions as and, but, and nor between two independent clauses--when one or both clauses have commas contained within.

The carpenter ordered nails, screws, and brackets; but he still needed more hardware.

. . . before such words as namely, for instance, for example that begin an enumeration, list, etc.

The French flag has bars of three colors; namely, red, white, and blue.

. . . in lists where a comma is insufficient to separate the parts clearly.

Present at the conference were Mr. Frank Cole, treasurer; Mr. Harley Sinclair, comptroller; and Ms. Nancy Cone, secretary.

. . . before co-ordinate clauses of a compound sentence when joined by a transitional word or phrase. Follow with a comma. See sample below.

accordingly	as a result
in fact	however
on the contrary	meanwhile

He did not appear as scheduled; in fact, he gave no indication that he expected to appear.

Use a Colon

. . . after the salutation in a business letter (follow with two spaces).

Dear Sir: Gentlemen: Dear Ms. Johnston:

. . . to introduce items that follow such words as the following: thus, these, or a specific number (follow with two spaces).

We need these: paper, pencils, and erasers.

Mary has three admirable qualities: tact, honesty, and resourcefulness.

. . . to express the hours and minutes in figures (no space before or after).

1:15 a.m. 10:40 p.m. 8:15 a.m.

Do not Use a Colon

. . . before direct objects or predicate words.

We need oranges, lemons, and grapefruit.

Supplies needed are oranges, lemons, and grapefruit.

Use Quotation Marks

. . . to show the exact words of a speaker.

She said, "I plan to leave in ten minutes."

Do not Use Quotation Marks

. . . around an indirect quotation.

Joe said that he plans to arrive soon.

Use Quotation Marks

. . . to begin a new paragraph for each change of speaker.

Use Quotation Marks

. . . around titles of short poems, plays, stories, musical compositions, titles of art works, chapters, essays, speeches, and articles.

My favorite song is "Deep Purple."

Read the Chapter called "How to Braid."

Use Only One Set of Quotation Marks

. . . for two or more sentences by a speaker if they are not broken by explanatory material.

"I work in the afternoon. I study at night because I study better then," he said.

Use Quotation Marks

. . . outside periods or commas.

Bob said, "Let's go fishing."

. . . outside question marks or exclamation marks if the quotation itself is a question or an exclamation.

Sid asked, "Where are you?" (only the quotation is a question)
Did Herb say, "Where are you"? (whole sentence is a question)
"It is he!" exclaimed Jean. (whole sentence is an exclamation)
How happy I am to say, "I agree"! (whole sentence is an exclamation)

Use Single Quotation Marks

. . . for a quotation within a quotation.

"Herb often says, 'I will not do that,'" said Sue.

Use an Underline

. . . under titles of books; newspapers; magazines; titles of long plays; musical works; names of ships, planes, trains.

Use Parentheses (a stronger separation than commas or dashes)

. . . to set off parenthetical comments that are apart from the general makeup of the sentence.

They met at the principal's home (where all such meetings were held) last Saturday night.

. . . to enclose letters or numbers in enumerations that are part of a text.

He sometimes thought of losers as being in two categories: (1) those who could but would not; and (2) those who would not but could.

Place punctuation marks such as commas and periods within the parentheses if they belong to the parenthetical clause or phrase. Place them outside if they belong to the rest of the sentence.

The student handbook specifies that fighting on school property can cause temporary suspension from classes (see page 13).

A student can be suspended for fighting on school property. (Rules governing suspensions are covered on page 13.)

Bring your car tomorrow (Friday), and I will repair it for you.

CAPITALIZATION

Capitalize the Following:

. . . geographical names.

Reed City Cherry Street Flat River

. . . names of people, days of the week, and months (but not seasons).

. . . schools, businesses, churches, clubs, institutions.

. . . names of countries, nationalities, races.

. . . names of holidays, famous events, historical periods, and historical documents.

Declaration of Independence Normandy Invasion

. . . names of trains, ships, planes, buildings, brand names.

. . . names of certain sections of the country or the world (but not directions).

. . . words of family relationship only when used with the person's name or as a substitute for it.

Mother, but not my mother.

Aunt Dorothy, but not my aunt.

. . . titles of persons preceding personal names.

Captain Fred Putnam Lieutenant McNally

. . . titles of books, plays, poems, articles, themes, newspapers, musical works, articles (important words only).

. . . words that pertain to languages or school subjects that are followed by a number (but not others).

Spanish I Bookkeeping II

. . . first word of every direct quotation.

. . . the first word of every line of poetry.

. . . the pronoun I and interjection Oh.

Capitalize

. . . initials and abbreviations of words that should be capitalized.

. . . each word in the salutation of a letter. Capitalize only the first word in a complimentary close.

Yours truly, Very truly yours,

. . . the first word of each sentence.

. . . words like street, avenue when following a proper noun.

Woodward Avenue Cork Street

. . . most nouns that precede a figure.

Section II Volume VIII

Do not Capitalize

. . . the following nouns preceding a figure.

line 14 page 222 verse 3

WORD DIVISION

Words may usually be divided between syllables unless an exception applies. Ordinarily, pronouncing a word gives a clue, but often it will be necessary to consult the dictionary for the correct point of division. It is best not to divide a word if it is not absolutely necessary. If it is necessary, the following are some rules to follow:

1. Divide only words containing six or more letters.

2. Do not divide proper names, abbreviations, or numbers. If it must be done, a date may be separated between the day and year (do not use the hyphen).

3. It is correct to divide after a single vowel syllable within a word. If two single-vowel syllables occur side by side, divide between the vowels. See samples just below:

separate sepa-

perpetuate perpetu-

4. Never divide a two-letter syllable at the end of a word like chastity. Never divide a two-letter syllable at the beginning of a word like detachment.

5. Never divide contractions like isn't.

6. Never divide words at the ends of two consecutive lines of typewriting.

7. Never divide the last word on a page. Carry it intact to the next page.

8. Never separate abbreviations or numbers (U.S.A. 12,316,249).

9. Avoid dividing hyphenated words and compounds except at the hyphen (like self-directed).

10. Never divide a single-letter syllable at the beginning or at the end of a word.

around	a-
steady	stead-

D. Record-Keeping Systems/Methods - Filing

Every office is responsible for maintaining a system of recording all of the work it has produced. Some systems are simple, others complex. Filing is a record-keeping system for which there are many methods of maintenance. Choosing the filing system pertinent to your office will be determined by the nature of your work. Filing may be the most dreaded and avoided chore in any office. However, with a good system, filing need not be a boring and tedious job but could be an asset to your daily time management plan.

1. Poor Filing Habits - Poor filing habits are a major source of wasting time and energy.

   a. letting the material to be filed accumulate into an unmanageable paper mountain

   b. pushing papers into any available file, burying it possibly forever, just to get them out of the way

   c. repeatedly looking for something you are sure you just filed

   d. duplicating existing files

   Each of these steps are frequent occurrences in busy offices today. They must be avoided if any system is to work for you and your office. A filing system which is functional, consistent and manageable is vital to the operation of any office, business or organization.

2. Examples of Filing Systems

   a. alphabetic: use when filing personnel records, other agencies or business with whom you do a volume of work, vendors, service agencies, and other "headings" that may logically fit into an alphabetized system, etc.

   b. chronological: use when filing invoices, billing data, reports received covering a specific time period (weekly, monthly, annual, etc.), financial records, miscellaneous correspondence, etc.

   c. subject heading: for office with little correspondence and more research data and information, filing by subject would be the most convenient. Files here would carry the heading of the information being accumulated for research or reference, e.g. juvenile justice, family planning, group training, etc. This is the type of system most often used in non-profit agencies performing services.

d. Numerical filing: This is a more time consuming system to initiate, but it does allow the benefit of not duplicating files, maintains confidentiality when it is needed, and must be accompanied with a thorough indexing system which is well maintained. This filing system is used when the major business is dealing with people in a confidential nature. Each file is assigned a number, and then the files are put in sequential order. The pitfall to this system is if a paper is filed incorrectly, it is almost impossible to find.

e. Geographic filing: This system is used in "central" office situations that receive correspondence, data and information from regional or area offices. This system is sometimes simplified by using a major geographic filing system that is then broken down into an alphabetical or numerical system.

In choosing a system, remember that it must function for your purposes, must be as simple as your workload permits, and must be arranged in a logical and easily understood fashion. And, it must be consistent.

3. Filing Aids - There are several added aids for establishing and maintaining good filing systems.

a. Indexing: This is a decision-making process which helps you decide where a document will be filed. This is done regardless of the system being used and can be accomplished as simply as as underlining the category on the item being filed, noting in the upper right-hand corner where it is to be filed as soon as it is given to you to be filed, or assigning it a prearranged number.

b. Coding: This is a labeling process done just prior to the actual filing of a document or item for easy identification now or in the future. Color coding is a common form which is used to note when a file is to be removed, what category it belongs to, the supervisor involved, the department, etc. Color coding is an efficient way of remembering which items must be kept for a short period of time or indefinitely (see Records Retention Timetable attached).

c. Cross-referencing: This is a method of checking and balancing and insuring a working filing system. Often times, items should be in more than one place; rather than accumulate more paper, cross-referencing allows the use of one document, but it is noted as being applicable to another subject, file or department.

4. Other Filing Systems

   a. Tickler File: This system is also called a follow-up file. The system is meant to be used each day, week, or month and will not aid you in your work if it is not put into action and maintained. The tickler file is best suited for offices which require frequent follow-up or answers to material distributed. The system may be set up for weeks, days of month, or months of the year; thus comprising seven, thirty-one or twelve folders, or a combination of all depending upon the frequency needed. Make it a habit to consult the file each day or every Monday, and eventually this automatic reflect will result in better organization and more effective use of your time. You will begin to rely on the tickler file to be your memory jogger and act as your "to-do" list.

   b. Card Files: Card files are not meant to take the place of any other filing system (correspondence, reports, records, etc.). However, some smaller offices may be able to maintain their record-keeping needs on index cards filed in a desk or table top cabinet. Card sizes vary to accommodate needs. Examples of card filing systems are: names and addresses of frequently contacted people, government vendors used frequently, and other contacts made on a regular basis. There should be sufficient room to note on the card any particular item needed to know when dealing with the person (contract number, supplies received or ordered through this company, vital statistics, consultant's expertise, etc.); catalog research data, books on file, resource materials, bibliography and annotations of material available from your office; personnel records of present and past employees (not meant to replace files which are required by law) to be used as a ready reference if your office is responsible for verification of employment, references, noting accumulated sick or vacation time, etc. This system may also be used to record the names of interns, volunteers, people applying for positions that you want to keep in file, etc.; and office systems such as proper telephone techniques, handling incoming and outgoing mail, filing (indicating the system used, itemized categories, where located, and retention requirements).

      The card file saves steps and time when it is used frequently and properly.

5. Pitfalls of Filing - Filing systems can be made simple, and by frequent maintenance they can be held to a manageable condition. Beware of the pitfalls which makes filing seem like such a drudgery.

   a. Guides/headings/categories are too broad, complex, similar.

   b. Files are permitted to become obese.

c. Drawers become too crowded.

d. There is no cross-referencing system.

e. Filing without indexing or coding leads to misplaced papers or items.

6. File Maintenance

a. Purge your files as often as possible, but plan to do this during the slack periods of your year. You will know which times are slow as you become accustomed to the operation of your agency or office. If you schedule and plan this activity, you will make the time and do it. Throw out items you have coded: not needed after ____ period of time (see records retention attached); consolidate inactive files; store old records that may be needed for research but don't need to take up space needed for present business. Clean them out and make them more organized and accessible.

b. File as often as possible. Make it a daily routine to come into the office in the morning, check your daily calendar, and then do filing from the previous day. Or last thing at night after cleaning off your desk, prepare yourself to leave by "relaxing" while filing (it is a job not requiring thought processes or other equipment so it will calm you from a busy day and ease your tension before joining your family).

c. Make it your motto, "If in doubt, throw it out." Do not file anything unless you feel you will have to refer to it in the future. Ask yourself, "What will happen if I don't file this?"

d. Do not use paper clips with filed material. They clog up the files and make retrieval difficult. Staple papers together instead.

e. Use hanging files. Do not jam manilla folders into a filing cabinet by themselves. You want to be able to retrieve items quickly.

f. Anticipate what files will be needed in the future. Again, plan this activity for a slow period. Make next year's file heading labels, make revisions that may be needed, change color coding system if necessary, etc.

g. When you become familiar with your office, the routine of your office and your company's business, you may be able to suggest methods or systems for the company as well as your office which will lead to streamlining. Be aware of these possibilities and jot down the suggestions and test them as you continue your present system to determine it's feasibility.

7. Dig Yourself out of the Paper Avalanche - Whatever record-keeping methods or systems used in an office, there is one truth that cannot be overlooked. Paperwork is the major time consumer. Keeping paperwork at a minimum will avoid your being buried in volumes of unnecessary paper mounds.

   a. Put the bare necessities in writing. Don't send out a memo or a letter if you do not need to retain a copy; make a telephone call or office visit if it will serve the same purpose.

   b. Answer letters requesting information on the letter received (using the margin, the bottom or the other side), when appropriate.

   c. Record only items that will have to be used to verify or document that something was done.

   d. If you pick up a piece of paper, don't put it down without doing something that will move it on its way. Everytime you pick up a piece of paper needing your action, failing to act means you'll have to double the time and energy spent on it by later picking it up again.

   e. Start a campaign against excessive paper usage in your office Talk it up with your boss and your colleagues. Schedule a meeting to get people in your office discussing ways to cut down needless paperwork and paper flow.

8. Forms

   The forms you are required to use, complete or submit are record-keeping methods and systems. Forms, like filing, can often become a boring and burdensome task when they are not completed quickly and efficiently. If your office operates through the completion of forms (data collection, input/output of word processing, supply ordering, etc.), perhaps you can design one that is more effective. If so, do so. You will be doing you and your office a service by learning to conserve paper, time and work.

   Forms should be used to avoid repetition of jobs, to present needed information in a logical and organized manner, to aid filing of the completed form, and to relate to a specific (rather than many) subject or need. Do not, however, become so obsessed with using forms that they become more time consuming than originally intended.

   Everyone is painfully aware of the avalanche of forms required by government agencies...seemingly full of unnecessary and innocuous information. How many times have you questioned forms and the need for the information requested. We fill out forms

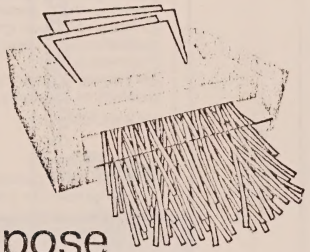
more often than we think: credit application, driver's license application/renewal, changes in name and address, request for information, ordering supplies, deposit/withdrawal slips, checks, etc.

There are many systems built into the operation of an office and most are genuinely necessary. Take inventory of the systems used in your office (including filing, forms, bookkeeping, and other methods of recording activities), and see if they can be streamlined or consolidated to improve your work environment and conserve your time.

Practicing the helpful hints discussed in this section will help you maintain an efficient and organized office and also make you a better time manager.

RECORDS RETENTION TIMETABLE

Retention Periods as allowed by government authorities.



When you dispose of your records, do it safely without loss or worry.

Use this retention chart as a guide to your retention program. It lists records by business function to make it easy to handle related records.

This chart covers most Federal and State regulations (there are about 900 regulations). Because state retention statutes vary widely on tax, unemployment, and workmen's compensation records, check with the tax commissioner of the states in which you do business for details.

Also be sure to include in your retention program, a timetable for transferring records from active files to inactive storage.

Do not overlook the fact that you often store more than one copy of the same record. For example, Central files will retain a contract permanently, but a department may have no need for its copy after the contract terminates. Be sure to include storage and disposal instructions of multiple copies of records in your retention program.

Don't forget that in addition to paper, ledger and cards, records appear on film, microfilm, microfiche, plastic cards, light metals, carbon paper, carbon ribbons, and punched tape.

Timetable

LEGEND FOR AUTHORITY TO DISPOSE

- AD—Administrative Decision
- ASPR—Armed Services Procurement Regulation
- CFR—Code of Federal Regulations
- FLSA—Fair Labor Standards Act
- ICC—Interstate Commerce Commission
- INS—Insurance Company Regulation
- ISM—Industrial Security Manual, Attachment to DD Form 441

LEGEND FOR RETENTION PERIOD

- AC—Dispose After Completion of Job or Contract
- AE—Dispose After Expiration
- AF—After End of Fiscal Year
- AM—After Moving
- AS—After Settlement
- AT—Dispose After Termination
- ATR—After Trip
- OBS—Dispose When Obsolete
- P—Permanent
- SUP—Dispose When Superseded

* After Disposed ** Normally † Govt. R&D Contracts

	RETENTION PERIOD-YEARS	AUTHORITY
ACCOUNTING & FISCAL		
Accounts Payable Invoices	3	ASPR-STATE, FLSA
Accounts Payable Ledger	P	AD
Accounts Receivable Ledgers	5	AD
Authorizations for Accounting	SUP	AD
Balance Sheets	P	AD
Bank Deposits	3	AD
Bank Statements	3	AD
Bonds	P	AD
Budgets	3	AD
Capital Asset Record	3*	AD
Cash Receipt Records	7	AD
Check Register	P	AD
Checks, Dividend	6	
Checks, Payroll	2	FLSA, STATE
Checks, Voucher	3	FLSA, STATE
Cost Accounting Records	5	AD
Earnings Register	3	FLSA, STATE
Entertainment Gifts & Gratuities	3	AD
Estimates, Projections	7	AD
Expense Reports	3	AD
Financial Statements, Certified	P	AD
Financial Statements, Periodic	2	AD
General Ledger Records	P	CFR
Labor Cost Records	3	ASPR, CFR
Magnetic Tape and Tab Cards	1**	
Note Register	P	AD
Payroll Registers	3	FLSA, STATE
Petty Cash Records	3	AD
P & L Statements	P	AD
Salesman Commission Reports	3	AD
Travel Expense Reports	3	AD
Work Papers, Rough	2	AD
ADMINISTRATIVE RECORDS		
Audit Reports	10	AD
Audit Work Papers	3	AD
Classified Documents: Inventories, Reports, Receipts	10	AD
Correspondence, Executive	P	AD
Correspondence, General	5	AD
Directives from Officers	P	AD
Forms Used, File Copies	P	AD
Systems and Procedures Records	P	AD
Work Papers, Management Projects	P	AD

	RETENTION PERIOD-YEARS	AUTHORITY
COMMUNICATIONS		
Bulletins Explaining Communications	P	AD
Messenger Records	1	AD
Phone Directories	SUP	AD
Phone Installation Records	1	AD
Postage Reports, Stamp Requisitions	1 AF	AD
Postal Records, Registered Mail & Insured Mail Logs & Meter Records	1 AF	AD, CFR
Telecommunications Copies	1	AD
CONTRACT ADMINISTRATION		
Contracts, Negotiated. Bailments, Changes, Specifications, Procedures, Correspondence	P	CFR
Customer Reports	P	AD
Materials Relating to Distribution Revisions, Forms, and Format of Reports	P	AD
Work Papers	OBS	AD
CORPORATE		
Annual Reports	P	AD
Authority to Issue Securities	P	AD
Bonds, Surety	3 AE	AD
Capital Stock Ledger	P	AD
Charters, Constitutions, Bylaws	P	AD
Contracts	20 AT	AD
Corporate Election Records	P	AD
Incorporation Records	P	AD
Licenses - Federal, State, Local	AT	AD
Stock Transfer & Stockholder	P	AD
LEGAL		
Claims and Litigation Concerning Torts and Breach of Contracts	P	AD
Law Records - Federal, State, Local	SUP	AD
Patents and Related Material	P	AD
Trademark & Copyrights	P	AD
LIBRARY, COMPANY		
Accession Lists	P	AD
Copies of Requests for Materials	6 mos.	AD
Meeting Calendars	P	AD
Research Papers, Abstracts, Bibliographies	SUP, 6 mos. AC	AD
MANUFACTURING		
Bills of Material	2	AD, ASPR
Drafting Records	P	AD†
Drawings	2	AD, ASPR
Inspection Records	2	AD
Lab Test Reports	P	AD
Memos, Production	AC	AD
Product, Tooling, Design, Enginneering Research, Experiment & Specs Records	20	STATUE LIMITATIONS
Production Reports	3	AD
Quality Reports	1 AC	AD
Reliability Records	P	AD
Stock Issuing Records	3 AT	AD, ASPR
Tool Control	3 AT	AD, ASPR
Work Orders	3	AD
Work Status Reports	AC	AD

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OFFICE SUPPLIES & SERVICES		
Inventories	1 AF	AD
Office Equipment Records	6 AF	AD
Requests for: Services	1 AF	AD
Requisitions for Supplies	1 AF	AD
PERSONNEL		
Accident Reports, Injury Claims, Settlements	30 AS	CFR, INS, STATE
Applications, Changes & Terminations	5	AD, ASPR, CFR
Attendance Records	7	AD
Employee Activity Files	2 or SUP	AD
Employee Contracts	6 AT	AD
Fidelity Bonds	3 AT	AD
Garnishments	5	AD
Health & Safety Bulletins	P	AD
Injury Frequency Charts	P	CFR
Insurance Records, Employees	11 AT	INS
Job Descriptions	2 or SUP	CFR
Rating Cards	2 or SUP	CFR
Time Cards	3	AD
Training Manuals	P	AD
Union Agreements	3	WALSH-HEALEY ACT
PLANT & PROPERTY RECORDS		
Depreciation Schedules	P	AD
Inventory Records	P	AD
Maintenance & Repair, Building	10	AD
Maintenance & Repair, Machinery	5	AD
Plant Account Cards, Equipment	P	CFR, AD
Property Deeds	P	AD
Purchase or Lease Records of Plant Facility	P	AD
Space Allocation Records	1 AT	AD
PRINTING & DUPLICATING		
Copies Produced, Tech. Pubs., Charts	1 or OBS	AD
Film Reports	5	AD
Negatives	5	AD
Photographs	1	AD
Production Records	1 AC	AD
PROCUREMENT, PURCHASING		
Acknowledgements	AC	AD
Bids, Awards	3 AT	CFR
Contracts	3 AT	AD
Exception Notices (GAO)	6	AD
Price Lists	OBS	AD
Purchase Orders, Requisitions	3 AT	CFR
Quotations	1	AD
PRODUCTS, SERVICES, MARKETING		
Correspondence	3	AD
Credit Ratings & Classifications	7	AD
Development Studies	P	AD
Presentations & Proposals	P	AD
Price Lists, Catalogs	OBS	AD
Prospect Lines	OBS	AD
Register of Sales Order	NO VALUE	AD
rveys	P	AD
ork Papers, Pertaining to Projects	NO VALUE	AD

PUBLIC RELATIONS & ADVERTISING		
Advertising Activity Reports	5	AD
Community Affairs Records	P	AD
Contracts for Advertising	3 AT	AD
Employee Activities & Presentations	P	AD
Exhibits, Releases, Handouts	2 - 4	AD
Internal Publications	P (1 copy)	AD
Layouts	1	AD
Manuscripts	1	AD
Photos	1	AD
Public Information Activity	7	AD
Research Presentations	P	AD
Tear-Sheets	2	AD
SECURITY		
Classified Material Violations	P	AD
Courier Authorizations	1 mo. ATR	AD
Employee Clearance Lists	SUP	ISM
Employee Case Files	5	ISM
Fire Prevention Program	P	AD
Protection - Guards, Badge Lists, Protective Devices	5	AD
Subcontractor Clearances	2 AT	AD
Visitor Clearance	2	ISM
TAXATION		
Annuity or Deferred Payment Plan	P	CFR
Depreciation Schedules	P	CFR
Dividend Register	P	CFR
Employee Withholding	4	CFR
Excise Exemption Certificates	4	CFR
Excise Reports (Manufacturing)	4	CFR
Excise Reports (Retail)	4	CFR
Inventory Reports	P	CFR
Tax Bills and Statements	P	AD
Tax Returns	P	AD
TRAFFIC & TRANSPORTATION		
Aircraft Operating & Maintenance	P	CFR
Bills of Lading, Waybills	2	ICC, FLSA
Employee Travel	1 AF	AD
Freight Bills	3	ICC
Freight Claims	2	ICC
Household Moves	3 AM	AD
Motor Operating & Maintenance	2	AD
Rates and Tariffs	SUP	AD
Receiving Documents	2 - 10	AD, CFR
Shipping & Related Documents	2 - 10	AD, CFR

PART 516—RECORDS TO BE KEPT BY EMPLOYERS

Introductory

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516.1 Form of records; scope of regulations.

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516.3 Bona fide executive, administrative, and professional employees (including academic administrative personnel and teachers in elementary or secondary schools), and outside sales employees as referred to in section 13(a)(1) of the Act—items required.

516.4 Posting of notices.

516.5 Records to be preserved 3 years.

516.6 Records to be preserved 2 years.

516.7 Place for keeping records and their availability for inspection.

516.8 Computations and reports.

516.9 Petitions for exceptions.

516.10 Amendment of regulations.

Subpart B—Records Pertaining to Employees Subject to Miscellaneous Exemptions Under the Act; Other Special Requirements

516.11 Employees exempt from both minimum wage and overtime pay requirements under section 13(a)(2), (3), (4), (5), (8), (9), (10), (11), (12), (13), or (14) of the Act.

516.12 Employees exempt from overtime pay requirements pursuant to section 13(b), (1), (2), (3), (4), (5), (7), (9), (10), (15), (16), (17), or (18) of the Act, and hotel, motel, and restaurant employees exempt from overtime pay under section 13(b)(8).

516.13. Livestock auction employees exempt from overtime pay requirements under section 13(b)(13) of the Act.

516.14. Country elevator employees except from overtime pay requirements under section 13(b)(14) of the Act.

516.15. Local delivery employees exempt from overtime pay requirements pursuant to section 13(b)(11) of the Act.

516.16. Commission employees of a retail or service establishment exempt from overtime pay requirements pursuant to section 7(i) of the Act.

Sec.

516.17 Seamen exempt from overtime pay requirements pursuant to section 13(b)(6) of the Act.

516.18 Employees employed in industries "of a seasonal nature" who are partially exempt from overtime pay requirements pursuant to section 7(c) of the Act.

516.19 Employees engaged in industries handling and processing perishable agricultural commodities who are partially exempt from overtime pay requirements pursuant to section 7(d) of the Act.

516.20 Employees under certain collective bargaining agreements who are partially exempt from overtime pay requirements as provided in section 7(b)(1) or section 7(b)(2) of the Act.

516.21 Bulk petroleum employees partially exempt from overtime pay requirements pursuant to section 7(b)(3) of the Act.

516.22 Employees of residential care establishments or bowling establishments partially exempt from overtime pay requirements pursuant to section 13(b)(8) or 13(b)(19) of the Act.

516.23 Hospital employees compensated for overtime work on the basis of a 14-day work period pursuant to section 7(j) of the Act.

516.24 Employees employed under section 7(f) "Belo" contracts.

516.25 Employees paid for overtime on the basis of "applicable" rates provided in sections 7(g)(1) and 7(g)(2) of the Act.

516.26 Employees paid for overtime at premium rates computed on a "basic" rate authorized in accordance with section 7(g)(3) of the Act.

516.27 "Board, lodging, or other facilities" under section 3(m) of the Act.

516.28 Tipped employees.

516.29 Employees under more than one minimum hourly rate.

516.30 Learners, apprentices, messengers, students, or handicapped workers employed under special certificates as provided in section 14 of the Act.

516.31 Industrial homeworkers.

516.32 Employees subject to the equal pay provisions of the Act, as set forth in section 6(d).

516.33 Employees employed in agriculture.

AUTHORITY: The provisions of this Part 516 issued under sec. 11, 52 Stat. 1066, as amended; 29 U.S.C. 211.

SOURCE: The provisions of this Part 516 appear at 32 F.R. 9551, July 1, 1967, unless otherwise noted.

INTRODUCTORY

Section 516.1 Form of records; scope of regulations

(*a*) *Form of records.* No particular order or form of records is prescribed by the regulations in this part. However, every employer who is subject to any of the provisions of the Fair Labor Standards Act of 1938, as amended (hereinafter referred to as the "Act"), is required to maintain records containing the information and data required by the specific sections of this part.

(*b*) *Scope of regulations.* (1) The regulations in this part are divided into two subparts. Subpart A of this part contains the requirements applicable to all employers employing covered employees, including the general requirements relating to the posting of notices, the preservation and location of records, and similar general provisions. This subpart also contains the requirements applicable to employers of employees to whom both the minimum wage provisions of section 6 and the overtime pay provisions of section 7(a) of the Act apply. As most covered employees fall within this category, employers, in most instances, will be concerned principally with the recordkeeping requirements of Subpart A of this part. Section 516.3 thereof contains the requirements relating to executive, administrative, and professional employees (including academic administrative personnel or teachers in elementary or secondary schools), and outside sales employees.

(2) Subpart B of this part deals with the information and data, which must be kept with respect to employees (other than, executive, administrative, etc., employees) who are subject to any of the exemptions provided in the Act, and with special provisions relating to such matters as deductions from and additions to wages for "board, lodging, or other facilities," industrial homeworkers, employees dependent upon tips as part of wages, and employees subject to more than one minimum wage. The sections in Subpart B of this part require the recording of more, less, or different items of information or data than required under the generally applicable recordkeeping requirements of Subpart A of this part.

SUBPART A—GENERAL REQUIREMENTS

Section 516.2 Employees subject to minimum wage or minimum wage and overtime provisions; section 6 or sections 6 and 7(a) of the Act

(a) *Items required.* Every employer shall maintain and preserve payroll or other records containing the following information and data with respect to each and every employee to whom section 6 or both sections 6 and 7(a) of the Act apply:

(1) Name in full, and on the same record, the employee's identifying symbol or number if such is used in place of name on any time, work, or payroll records. This shall be the same name as that used for Social Security record purposes,

(2) Home address, including zip code,

(3) Date of birth, if under 19,

(4) Sex and occupation in which employed (sex may be indicated by use of the prefixes Mr., Mrs., or Miss),

(5) Time of day and day of week on which the employee's workweek begins. If the employee is part of a work force or employed in or by an establishment all of whose workers have a workweek beginning at the same time on the same day, a single notation of the time of the day and beginning day of the workweek for the whole workforce or establishment will suffice. If, however, any employee or group of employees has a workweek bebinning and ending at a different time, a separate notation shall then be kept for that employee or group of employees,

(6) (i) Regular hourly rate of pay for any week when overtime is worked and overtime excess compensation is due under section 7(a) of the Act, (ii) basis on which wages are paid (such as "$2 hr."; "$16 day"; "$80 wk."; "$80 wk. plus 5 percent commission on sales over $800 wk."), and (iii) the amount and nature of each payment which,

pursuant to section 7(e) of the Act, is excluded from the "regular rate" (these records may be in the form of vouchers or other payment data),

(7) Hours worked each workday and total hours worked each workweek (for purposes of this section, a "workday" shall be any consecutive 24 hours),

(8) Total daily or weekly straight-time earnings or wages, that is, the total earnings or wages due for hours worked during the workday or workweek, including all earnings or wages due during any overtime worked, but exclusive of overtime excess compensation,

(9) Total overtime excess compensation for the workweek, that is, the excess compensation for overtime worked which amount is over and above all straight-time earnings or wages also earned during overtime worked,

(10) Total additions to or deductions from wages paid each pay period. Every employer making additions to or deductions from wages shall also maintain, in individual employee accounts, a record of the dates, amounts, and nature of the items which make up the total additions and deductions,

(11) Total wages paid each pay period,

(12) Date of payment and the pay period covered by payment.

(b) *Records of retroactive payment of wages.* Every employer who makes retroactive payment of wages or compensation under the supervision of the Administrator pursuant to section 16(c) of the Act, shall:

(1) Record and preserve, as an entry on his payroll or other pay records, the amount of such payment to each employee, the period covered by such payment, and the date of payment.

(2) Prepare a report of each such payment on the receipt form provided or authorized by the Wage and Hour Division, and (i) preserve a copy as part of his records, (ii) deliver a copy to the employee, and (iii) file the original, which shall evidence payment by the employer and receipt by the employee, with the Administrator or his authorized representative within 10 days after payment is made.

(c) *Employees working on fixed schedules.* With respect to employees, working on fixed schedules, an employer may maintain records showing instead of the hours worked each day and each week as required by paragraph (a)(7) of this section, the schedule of daily and weekly hours the employee normally works, and

(1) In weeks in which an employee adheres to this schedule, indicates by check mark, statement, or other method that such hours were in fact actually worked by him, and

(2) In weeks in which more or less than the scheduled hours are worked, shows the exact number of hours worked each day and each week.

Section 516.3 Bona fide executive, administrative, and professional employees (including academic administrative personnel and teachers in elementary or secondary schools), and outside sales employees as referred to in section 13(a)(1) of the Act—items required.

With respect to persons employed in a bona fide executive, administrative, or professional capacity (including employees employed in the capacity of academic administrative personnel or teachers in elementary or secondary schools), or in the capacity of outside salesman, as defined in Part 541 of this chapter (pertaining to so-called "white collar" employee exemptions), employers shall maintain and preserve records containing all the information and data required by § 516.2(a) except subparagraphs (6) through (10) thereof, and, in addition thereto the basis on which wages are paid in sufficient detail to permit calculation for each pay period of the employee's total remuneration for employment including fringe benefits and perquisites. (This may be shown as "$725 mo. * * * $165 wk. * * * $1,200 mo. plus 2 percent commission on gross sales * * * on fee basis per schedule No. 2" with appropriate addenda such as "plus hospitalization and insurance plan A," "benefit package B," "2 weeks' paid vacation," etc.)

[38 F.R. 7115, Mar. 16, 1973]

Section 516.4 Posting of notices

Every employer employing any employees who are (a) engaged in commerce or in the production of goods for commerce or (b) employed in an enterprise engaged in commerce or in the production of goods for commerce, and who are not specifically exempt from both the minimum wage provisions of section 6 and the overtime provisions of section 7(a) of the Act, shall post and keep posted such notices pertaining to the applicability of the Act, as shall be prescribed by the Wage and Hour Di-

vision, in conspicuous places in every establishment where such employees are employed so as to permit them to observe readily a copy on the way to or from their place of employment.

Section 516.5 Records to be preserved 3 years

Each employer shall preserve for at least 3 years:

(a) *Payroll records.* From the last date of entry, all those payroll or other records containing the employee information and data required under any of the applicable sections of this part, and

(b) *Certificates, agreements, plans, notices, etc.* From their last effective date, all written:

(1) Collective bargaining agreements relied upon for the exclusion of certain costs under section 3(m) of the Act,

(2) Collective bargaining agreements, under section 7(b)(1) or 7(b)(2) of the Act, and any amendments or additions thereto,

(3) Plans, trusts, employment contracts, and collective bargaining agreements under section 7(e) of the Act,

(4) Individual contracts or collective bargaining agreements under section 7(f) of the Act. Where such contracts or agreements are not in writing, a written memorandum summarizing the terms of each such contract or agreement,

(5) Written agreements or memoranda summarizing the terms of oral agreements or understandings under section 7(g) or 7(j) of the Act, and

(6) Certificates and notices listed or named in any applicable section of this part.

(c) *Sales and purchase records.* A record of (1) total dollar volume of sales or business, and (2) total volume of goods purchased or received during such periods (weekly, monthly, quarterly, etc.) and in such form as the employer maintains in the ordinary course of his business.

Section 516.6 Records to be preserved 2 years

(a) Supplementary basic records: Each employer required to maintain records under this part shall preserve for a period of at least 2 years:

(1) *Basic employment and earnings records.* From the date of last entry, all basic time and earning cards or sheets of the employer on which are entered the daily starting and stopping time of individual employees, or of separate work forces, or the individual employee's daily, weekly, or pay period amounts of work accomplished (for example, units produced) when those amounts determine in whole or in part the pay period earnings or wages of those employees.

(2) *Wage rate tables.* From their last effective date, all tables or schedules of the employer which provide the piece rates or other rates used in computing straight-time earnings, wages, or salary, or overtime excess computation, and

(3) *Worktime schedules.* From their last effective date, all schedules or tables of the employer which establish the hours and days of employment of individual employees or of separate work forces.

(b) Order, shipping, and billing records: Each employer shall also preserve for at least 2 years from the last date of entry the originals or true copies of any and all customer orders or invoices received, incoming or outgoing shipping or delivery records, as well as all bills of lading and all billings to customers (not including individual sales slips, cash register tapes or the like) which the employer retains or makes in the course of his business or operations.

(c) Records of additions to or deductions from wages paid: Each employer who makes additions to or deductions from wages paid shall preserve for at least 2 years from the date of last entry:

(1) Those records of individual employee accounts referred to in § 516.2(a)(10),

(2) All employee purchase orders, or assignments made by employees, all copies of addition or deduction statements furnished employees, and

(3) All records used by the employer in determining the original cost, operating and maintenance cost, and depreciation and interest charges, if such costs and charges are involved in the additions to or deductions from wages paid.

(d) Each employer shall preserve for at least 2 years the records he makes of the kind described in § 516.32 which explain the basis for payment of any wage differential to employees of the opposite sex in the same establishment.

Section 516.7 Place for keeping records and their availability for inspection

(a) *Place of records.* Each employer shall keep the records required by the regulations in this part safe and accessible at the place or places of employment, or at one or more established central recordkeeping offices where such records are customarily maintained. Where the records are maintained at a central recordkeeping office, other than

in the place or places of employment, such records shall be made available within 72 hours following notice from the Administrator or his duty authorized and designated representative.

(b) *Inspection of records.* All records shall be open at any time to inspection and transcription by the Administrator or his duly authorized and designated representative.

Section 516.8 Computations and reports

Each employer required to maintain records under this part shall make such extension, recomputation, or transcription of his records and shall submit to the Wage and Hour Division such reports concerning persons employed and the wages, hours, and other conditions and practices of employment set forth in his records as the Administrator or his duly authorized and designated representative may request in writing.

Section 516.9 Petitions for exceptions

(a) *Submission of petitions for relief.* Any employer or group of employers who, due to peculiar conditions under which he or they must operate, desires authority to maintain records in a manner other than required in this part, or to be relieved of preserving certain records for the period specified in the regulations in this part, may submit a written petition to the Administrator setting forth the authority desired and the reasons therefor.

(b) *Action on petitions.* If, on review of the petition and after completion of any necessary investigation supplementary thereto, the Administrator shall find that the authority prayed for, if granted, will not hamper or interfere with enforcement of the provisions of the Act or any regulation or order issued thereunder, he may then grant such authority but limited by such conditions as he may determine are requisite, and subject to subsequent revocation. Where the authority granted hereunder is sought to be revoked for failure to comply with the conditions determined by the Administrator to be requisite to its existence, the employer or groups of employers involved shall be notified in writing of the facts constituting such failure and afforded an opportunity to achieve or demonstrate compliance.

(c) *Compliance after submission of petitions.* The submission of a petition or the delay of the Administrator in acting upon such petition shall not relieve any employer or group of employers from any obligations to comply with all the requirements of the regulations in this part applicable to him or them. However, the Administrator shall give notice of the denial of any petition with due promptness.

Section 516.10 Amendment of regulations

(a) *Petitions for revision of regulations.* Any person wishing a revision of any of the terms of the regulations in this part with respect to records to be kept by employers may submit to the Administrator a written petition setting forth the changes desired and the reasons for proposing them.

(b) *Action on such petitions.* If upon inspection of the petition the Administrator believes that reasonable grounds are set forth for amendment of the regulations in this part, the Administrator shall either schedule a hearing with due notice to interested persons, or make other provisions for affording interested persons an opportunity to present data, views, or arguments relating to any proposed changes.

SUBPART B—RECORDS PERTAINING TO EMPLOYEES SUBJECT TO MISCELLANEOUS EXEMPTIONS UNDER THE ACT; OTHER SPECIAL REQUIREMENTS

Section 516.11 Employees exempt from both minimum wage and overtime pay requirements under section 13(a) (2), (3), (4), (5), (8), (9), (10), (11), (12), (13), or (14) of the Act

With respect to each and every employee covered by the Act, but to whom the employer is neither required to pay the minimum wage provided in section 6 nor overtime compensation as provided in section 7, due to the applicability of section 13(a) (2), (3), (4), (5), (8), (9), (10), (11), (12), (13), or (14) of the Act, employers shall maintain and preserve records containing the information and data required by subparagraphs (1) through (4) of § 516.2(a) and, in addition thereto, information indicating the place or places of employment.

Section 516.12 Employees exempt from overtime pay requirements pursuant to section

E. Dictation/Transcription/Composition Methods

Word processing equipment is quickly changing the atmosphere of the relationship between clerical workers and their supervisors. Larger companies required to produce volumes of paperwork have come to rely heavily on word processing equipment and no longer resort to dictating to the secretary. Once programmed, the word processing operator will be able to make changes and corrections from handwritten copies.

Face-to-face dictation is no longer a frequent office activity. It has been found to be time consuming and costly. Many forms of dictating equipment have been manufactured over the years which are now widely used in small and large offices as a back-up to word processing equipment. Learning to use the equipment is important if it is to be a cost-effective method of dictation; learning to transcribe properly is also important. If you feel that improvements could be made in the method your supervisor/boss is using to dictate into a machine and you are experiencing problems transcribing, meet with your supervisor/boss and explain the situation and come to an agreement about improving the system. Manufacturers are willing to come to an office to demonstrate methods of efficient use of their equipment.

1. Transcription

   a. When transcribing, be alert to changes, improvements, punctuation and spelling which may not be easily discernible on the recording.

   b. When planning your time to transcribe from a cassette, consider times of the day when you are most frequently interrupted and plan accordingly. If your work involves extensive use of dictating/transcribing equipment, arrange with your boss the best times for each of you. Train your boss not to include rush or important letters or reports on a tape which may not be handled as soon as necessary. Suggest that your boss dictate in the morning and you transcribe in the afternoon; or have your boss dictate in the afternoon and you transcribe in the morning. The latter is usually the most efficient method as it allows a synchronized flow of the work between you and your boss.

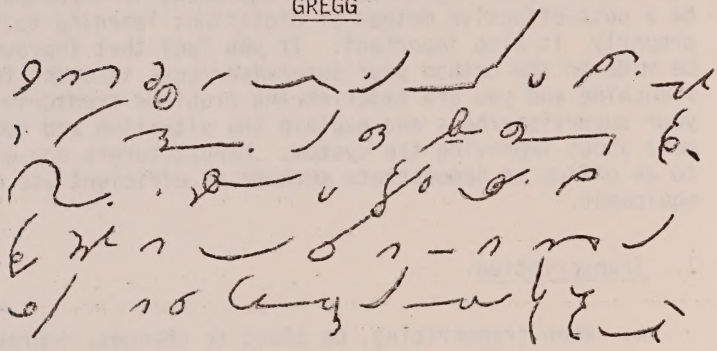
2. Composition Methods - There are offices, particularly in human services, which rely on clerical staff to take messages, correspondence, reports, minutes of meetings and other data in a dictating situation. If you are not required to take shorthand, there are still occasions when some form of quick writing may be helpful. If you have had no previous training in a shorthand method, it may be wise to take a course or to learn the basics from a library book.

Knowing and learning methods of quick note making/taking will save you hours and energy and help you to get all of the information being given to you.

a. Gregg Shorthand is a method of using symbols to represent letters of the alphabet, frequently used phrases, and abbreviated forms of long words. Learning to use the Gregg method of shorthand generally requires special training; however, the basics may be learned from a book.

b. Speedwriting is a method of using only consonants to indicate the word - eliminating the vowels, silent letters or use of phonetic forms of long words.

GREGG



SPEEDWRITING

as u cn se, th lnghnd mthd
of tkng nts s tm cnsmng nd
luses twice as much spc. Dvlpng
a styl of spdly wtng tht bst
sts u wl aid u n ur
wrk nd rwrd u wth
prmts nd mr jb rspnblts.

LONGHAND

As you can see, the longhand
method of taking notes is time
consuming and uses twice as
much space. Developing a
style of speedily writing that
best suits you will aid you in
your work and reward you
with promotions and more
job responsibilities.

TWELVE RULES FOR DICTATION

Taking Notes:

1) Date your notebook every day. There are many occasions when you might want to refer to your original notes.

2) Indicate who dictated the letter by putting the dictator's initials at the close. This is particularly important when you take dictation from someone other than your immediate boss. If you have more than one boss, use notebooks or pens of different colors (one for each executive).

3) Keep a rubber band around the used pages of your notebook. This is a great time-saver. It enables you to open your notebook to a clean page without fumbling.

4) Look over your notes if your boss pauses or is interrupted. It will help you to properly transcribe your notes and correct them when the dictation is fresh in your mind.

5) Wait until the end of the letter to ask for clarification. Don't break your boss' train of thought by interrupting. Let him finish before checking something that doesn't seem right to you.

6) Use only the left-hand column of the page if your boss is addicted to additions and changes. The blank column leaves adequate space for corrections.

7) Correct grammatical erros when transcribing. Do not correct the grammar while taking dictation. If your boss questions your changes, comply with his/her wishes and write it out the way he/she says it should be.

8) Make a notation if extra copies are to be made. Put this reminder at the beginning of your notes.

9) Make a note of all special instructions.

10) Face the speaker if possible. It is always easier to hear the dictator.

Transcribing Notes:

11) Make sure your notes are accurate and thorough. If there are gaps in your notes, check these with your boss at once.

12) Start transcribing as soon as possible. The longer you wait, the vaguer will be your recollection of the dictation. If you cannot transcribe your notes immediately or soon, you should at least try to read through them once. This will set them in your mind while the notes are fresh and allow you to clarify any rough spots in your notes.

F. Letter Writing

Every office sends letters, some more frequently than others. No matter how many letters you may be responsible to write or type every day, one thing is common with every piece of correspondence leaving your office — it is a reflection of you and your work, and of your company and its product. Sloppy letters denote sloppy businessess and will surely result in a loss of business or cooperation. Neat and well-written letters reflect a business that is concerned and effective.

1. When Planning Your Correspondence, consider

   a. the purpose of the letter

   b. organize the facts to be conveyed; don't brush off the idea of making an outline

   c. tailor the letter to the reader

   d. establish the tone (formal/informal)

   e. keep it brief and to the point

   TIP: Make your letter friendly, not familiar; conversational, not chatty; courteous, not saccharine; brief, not blunt.

2. When Writing Your Letters, remember to

   a. make them concise; say what you intend

   b. make every opening and closing statement something of vital interest; pleasant

   c. make your letter easy to read and easy to answer

   d. write the way you talk

   e. avoid jargon; avoid unnecessary definitions, explanations, references, long and unfamiliar words, and unrecognizable expressions or words

   f. make short, positive, active statements

   g. repeat information from the letter you are replying to only if necessary for identification, clarification or documentation/verification

   h. spell all names correctly; avoid the big mistake of mispelling the recipient's name

3. Styles of Correspondence - Business correspondence does not always follow one set pattern or style. Ask your boss what style of letter is preferred (block, indented, etc.), and use that style.

4. Types of Correspondence

   a. Form letters: In one situation or another, every business has resorted to using a form letter. The content of most form letters is highly impersonal. To make the letters less severe, the addressee is indicated individually when this is feasible. Form letters should be:

      (1) printed or duplicated cleanly and clearly

      (2) treated with as much respect for the receiver as an individually prepared letter

      (3) when time permits, addressed individually to soften the blow of receiving a volume-duplicated communication

      (4) revised often to be current and applicable to the purpose

      The content of form letters usually relates to a specific incident, subject or object. You can perform a service to yourself and your office by learning which situations could be handled through a form letter. Develop a file in which you put standard statements, effective statements, etc. Draft a form letter from the material accumulated and present it to your boss for consideration and approval.

   b. Memos: Memos are not only for inter-office correspondence, they are occasionally appropriate for other forms of communication. Memos are a formally constructed method of letter writing and deserve the same attention to detail and accuracy. Memos eliminate the opening and closing statements as used in letters, and present the information needed to be conveyed. Memos should be confined to one subject, which is indicated in the heading. Because it is an abbreviated method of communication, memos can be structured in an outline form using little narrative prose as an introduction and a close. When writing memos, say what has to be said and stop.

   c. Special circumstance correspondence: When writing what may be considered difficult, special circumstance letters, there are several techniques to assist in writing and producing an effective letter. Some of the difficult letters to compose are: letters of apology, condolence and recommendation.

(1) apology - when you must apologize in writing:

(a) admit error willingly

(b) don't blame others or expect them to share guilt

(c) send apology promptly to avoid over-emphasizing the error

(d) be sincere and make the apology reflect your feelings

(2) condolence - never an easy task as words never seem to be sufficient at time of sorrow or regret; to make them appreciated by the receiver:

(a) use personal stationery if a close relationship exists; business stationery if it is a business acquaintance

(b) handwrite to a friend; typing is acceptable to a business acquaintance with an added personal message at the end

(c) send it promptly

(d) keep it short; respecting the reader's feelings

(e) inject a note of personal attachment

(f) say it as you would face-to-face

(3) recommendation - not only are supervisors and business people called upon to write a letter of recommendation, but often you may be asked by a friend to provide a reference. In any case, remember:

(a) be honest; don't be over enthusiastic (even for a friend

(b) be careful with remarks that could cause repercussions

(c) emphasize points you found good; stress the person's strongest characteristics and skills

(d) stress points that will be of particular interest to the company requesting the reference

(e) make the reference pertinent for the purpose intended

5. Letter-Rating Checklist - Once you have composed your letters, take the following test and figure your batting average.

	YES	NO
Structure		
• Are the sentences short, easy to understand and read?	___	___
• Is the grammar correct?	___	___
• Is the language suitable to the person to whom the letter is addressed?	___	___
• Are active expressions used in place of the passive voice?	___	___
Clarity		
• Does the letter get right to the point?	___	___
• Is the message stated clearly and concisely?	___	___
• Does the letter include all the information the addressee needs in order to answer or take other action needed?	___	___
Public Relations		
• Is the letter free of any caustic remarks, rude statements, accusations, or an angry tone?	___	___
• Is the letter a credit to the company?	___	___
• Does the letter have that winning personal touch?	___	___

G. Report Writing

Many of the principles applied to letter writing apply to report writing. All pieces of communication should be concise, clear and organized. Reports are important to most agencies and organizations to relate what they have accomplished during a specific period of time or to announce the results of a survey, study or examination.

1. Produce a Good Report

   a. classify reports by purpose

   b. edit carefully

   c. clarify the data, interpret the data; verify information/data

   d. prepare an outline

   e. know audience and write for them

   f. avoid jargon, legalistic and unfamiliar words/phrases

   g. emphasize properly

   h. accentuate the positive

   i. style of report should support the purpose/premise

2. Produce a Bad Report, when:

   a. poorly prepared, researched, structured, organized

   b. does not serve intent of report

   c. poorly constructed and written

   d. too negative

   e. ineffective to justify the premise/information/data involved

3. Edit the Report

   a. is the report organized, understandable, clear, concise and complete

   b. do all the ideas and key issues tie into each other

   c. are the thoughts complete

d. is it free of jargon and unfamiliar terminology

e. are spelling, grammar, syntax, punctuation all correct

4. Does Your Report Pass the Test? - If your reports pass the tests in this section (sections 1, 2 and 3), you have produced a good report.

Whether writing a letter or a report, remember to write as you talk. Our federal government has long been notorious for long and wordy reports, bills and regulations. Avoid duplicating the mistakes made by government bodies. You wouldn't talk that way, don't write that way.

TIP: Bigger is not better; longer is not smarter; pompous is not courteous. Simple says it best.

WRITE WHAT YOU MEAN!

The following excerpts are taken from letters actually received by the Customer Service department of an insurance company. Check your letters for similar unintentially humorous situations.

1) "I cannot get sick pay. I have six children, can you tell me why it is?"

2) "This is my eighth child, what are you going to do about it?"

3) "Mrs. Brown has no clothing for a year and has been regularly visited by the clergy."

4) "I am glad to say that my husband, who was reported missing, is now deceased."

5) "Sirs: I am forwarding my marriage certificate and my two children one of which is a mistake as you may see."

6) "I am writing to say that my baby was born two years old. When do I get my money?"

7) "Unless I get my husband's money soon, I will be forced to lead an Immortal life."

8) "I am sending my marriage certificate and six children. I have seven, one died which was baptized on a half sheet of paper by Rev. Thomas."

9) "Please find for certain if my husband is dead. The man I am living with now won't eat or do anything until he knows for certain."

10) "My husband has been put in charge of a pitoon so now do I get my money?"

11) "I am very annoyed that you have branded by eldest child as illiterate. Oh, this is a dirty lie as I married his father a week before he was born."

12) "In answer to your letter, I have given birth to a boy weighing ten pounds. I hope this is satisfactory."

13) "You have changed my little boy to a girl. Will it make a difference?"

14) "Please send my money at once as I need it badly. I have fallen in error with my landlady."

15) "I have no children yet. My husband is a busdriver and works night and day."

16) "In accordance with your instructions I have given birth to twins in the enclosed envelope."

17) "I want my money as quick as you can send it. I have been in bed with a doctor for two weeks and he doesn't seem to do me much good. If things don't improve, I will have to send for another doctor."

III. FOCUSING ON YOU

Reviewing the environment in which you work, its set-up and efficiency, and further reviewing the skills necessary to operate within the environment would not be complete without focusing on you. You are the "piece" in this scheme that actually makes the entire system work. Harry Belafonte once said,

> "A competent and responsible secretary spells the difference between success and mediocrity in the everyday workings of any business."

In the following section we will review aspects of you and how you perceive your working day and career.

You must do self-evaluation and inventory of where you are now and where you hope to be when you attain the goal you have established for yourself. Each day is one more step toward achieving what you have chosen as your career. Learn to use each day as a new learning and climbing experience. Doing this moves you from a dull, routine experience into a new, challenging situation. If you have no future career goal - it may be time to consider:

A. Getting Started

Getting started is often the most difficult part of your day. On cold mornings it is more inviting to stay in a warm bed; on a sunny morning, you dream of beaches. When you arrive at the office, the reality of the piled-up work makes getting started a second time (the same day) a further challenge. The effectiveness of your day can be predicted within the first hour. If you get off to a bad start - if you are disorganized, prone to procrastination, then your day will probably follow suit. But, if you are organized, if you have a daily goal, a plan, you will be able to accomplish much.

It is tempting to procrastinate in the morning---greeting co-workers, having coffee, reading the paper and otherwise socializing as the office begins to fill and the day comes alive with activity. Avoid falling into this trap. It is acceptable to exchange pleasantries, get coffee, and then go to work. Refer immediately to the to-do list you prepared the evening before. Start at the beginning, where you set your priorities, and begin to work through the list. Getting started will be easier if you have organized and planned the night before. There will be no surprises - you will be prepared.

Earlier in this text, it was recommended that you recognize your best time of the day. It is definitely important that you are aware of your highs and lows as you begin each day, and attempt to get started. If your peak period is morning, get the difficult and time consuming work done right away before your "high" begins to slip into "low." If on the other hand, you are a slow starter, handle the routine, unpleasant and undemanding tasks at the beginning of the day (filing, sorting mail, duplicating, etc.). Completing these tasks will provide the basis of building up your steam, and still afford you a sense of accomplishment.

It is important to a healthy ego to have an ongoing, renewed sense of accomplishment. Once having determined the time of day you are capable of being most productive, arrange your schedule to suit these highs and lows. You will leave at the end of your work day with a true sense of accomplishment. Reward yourself for this. Set a goal for yourself and

reward achievement with something special: a special lunch, a bouquet of flowers, new clothes or jewelry, or something you've wanted but hesitate to buy because it seemed frivilous. Develop the attitude that you earned this reward because you have made great headway toward your goals. DO NOT TAKE A REWARD IF IT IS NOT EARNED. Be good to yourself by working to benefit you and your employer. Your rewards will mean more to you, and your sense of accomplishment will be beneficial to your career.

Other elements to aid you as you start each day involve your attitude. A University of Michigan psychologist determined that people with a ready smile tend to manage offices better, instruct others more effectively and have happier relationships than people who don't smile often. Starting your day with a smile will make your workload appear less imposing and burdensome. The smile will be your reception to others who will begin to respect your schedules and systems.

B. Your Work Cycle

Beyond knowing the best time of day for being productive, and how to begin each day determined to accomplish many things, learn your work cycle. Your special and individual work cycle encompasses your personality and style, your co-workers' personality and style, and of course, your boss's personality and style. Your individual cycle is developed by you over the course of your career experiences; it is often an unconsciously developed system encompassing the points discussed in this program. Your cycle is built by your strengths and weaknesses.

It is not enough to know what is expected of you - and simply do what is expected. Other variables determine the course of your work day, week, month, or year. These variables, accumulated over time, result in producing your work cycle. Knowing the most productive time of day for your boss is important to your cycle. If you have demands placed on you during that time of the day when you are not as energetic, your cycle will be counterproductive to the goals of your office.

Learn the habits and needs of your boss. This is of course done when you begin to determine the goals and objectives of your agency or office, and continue by breaking this down into your responsibilities toward achieving same. Simply knowing what your part is in the operation of the office is not enough. You must be aware of other peoples' parts as well if you are to work in unison toward the common goal.

Remember - you are in your office because you choose to be. Learn to enjoy your work by knowing that:

1. you make a difference and what you do helps your office run smoothly and efficiently;

2. because you are courteous on the phone, to visitors and to colleagues, you make a valuable contribution to the success of your office;

3. you accept responsibility for your work and do it in a responsible way; and,

4. you take an interest in your organization, department, agency or company and attempt to learn about it, and how you can be of better service to it.

All of these variables, throughout your career, shape and determine whether your work cycle will be smooth and efficient, or unproductive and the source of disatisfaction. Know your importance to the operation of your office, how you can be valuable to your boss during his/her work day, that you are a responsible person, and that you have a genuine interest in your work will make the cycle revolve with ease.

Arriving at work prepared, with a smile on your face and with enthusiasm can make a difference to office life. Enthusiasm avoids slipping into a rut; generates praise rather than criticism; is positive; is diplomatic rather than brusque; helps you get from others the aid you need to do your job; and establishes a spirit of cooperation. Enthusiasm is not always easy to generate; it is a cultivated habit. Successful people are enthusiastic people.

Starting your day prepared and organized, and learning to be enthused about your job demands desire, discipline and curiosity. If you have trouble getting started in the morning and the day drags on forever, change jobs. No amount of enthusiasm will improve an unhappy situation. Your office will not be productive, your attitude will exhibit your discontent and the cycle will be destructive to you.

C. Communicating

Communicating is undoubtedly the most used "tool" of your day. You communicate with your boss, co-workers, visitors, neighbors, friends, family, etc. Your form of communication is the key.

1. As A Representative Of Your Company

Not only do you make an appearance each day at your office, do your job and leave, but during the day and while socializing in the evening you are a representative of the business that is a major part of your life. Your job provides a major portion of your identity - strive to make that a positive image - for you and your company.

Although you may have disagreements and unpleasant situations at work, they are confidentially a part of your office and should remain there. Do not take these problems home with you. This causes friction at home, with your friends, and ultimately makes your work situation more unpleasant. Learn to be a good representative of your company, agency, office, or department, and you will be successful as a person.

You must remember: you are always a representative of your company; guard what you say and to whom. As a representative of your company, do you know what it does, how and how well? Do you guard business confidentialities?

In human services related agencies, these thoughts are absolutely important. As a representative supplying a tax-payer paid service, you do not fill a 9-to-5 job. You are a representative of your office twenty-four hours a day. And beyond, you are often a representative of the entire spectrum of services provided in a community, city, or state.

Your attitude about your work often determines your attitude about yourself. Consider the following and make your own determination of how well you communicate as a representative of your agency:

(1) Am I willing to work longer when necessary - or do I leave exactly at 5 p.m.?

(2) As the first contact with the public, do I create a good image for myself, my boss, my agency?

(3) Do I exhibit my enthusiasm by being pleasant with co-workers?

(4) Do I inspire confidence in myself?

(5) Do I plan each day striving for a sense of accomplishment?

(6) Do I offer to help others in my office?

(7) Am I often disgruntled, feeling overburdened and letting my boss know that I feel this way?

(8) Do I bring my personal problems to the office and allow them to waste my day?

(9) Do I cope with interruptions calmly?

(10) Do I have a sense of humor or do I explode easily?

The appearance of your office, your telephone personality and the manner in which you conduct yourself as a professional are all forms of communication. Each of these forms your image and the image you represent of your agency - strive to make them the best for you and your business.

2. As A Representative Of Yourself

The most representative manner of communication of self is by your exhibited behavior. To generate an atmosphere of cooperation and improve your skills on the job, you must behave in a way that solicits help from your boss and co-workers. Learn the value of:

(1) being discreet - avoid discussions of personal business (your and others), salaries, benefits and working conditions;

(2) being considerate - do not use company stamps, stationery or supplies for your personal business;

(3) being accommodating - do not take advantage of the generosity of the company by scheduling personal appointments at inconvenient times. Make necessary personal appointments early or late in the day, or on your lunch hour;

(4) being conservative - use spare time to fullest: up-date phone/address listings, clean out desk drawers, files or supply storage areas; and

(5) being helpful - helping others when you are caught up, will permit you the right to ask for help when the situation warrants; seek information you may not have readily available rather than reply with a curt, "I don't know". Helping others helps you.

Communicating to others that you are cooperative, willing to help and also willing to learn, creates an atmosphere more inviting to work in.

It is equally as important to know when to say "no." As a support staff person, you should not be used as a dumping ground for other peoples jobs, for unpleasant tasks your boss wishes to avoid, or to take on new projects. Being tactful, communicate to others that you do not have the time and be prepared to justify your refusal. Not being assertive when appropriate will lead to pressure for you, accumulation of work you cannot complete, and the development of harsh feelings among co-workers. Being reluctant to communicate with others about your feelings, creates an unhealthy and unhappy atmosphere which is felt by all. Being able to communicate for yourself, tactfully and discreetly, will build solid and trusting working relationships.

A part of communication in an office is the respect shown for co-workers - their schedules and habits. You are aware of your work cycle, be aware of others. Learn when they can be or cannot be disturbed. There is no excuse for imposing or neglecting to show co-workers the same respect you expect in return. It is suggested that you "train" your co-workers to know when you can or cannot be disturbed. This can be accomplished by many forms of communication: a hotel "do not disturb" sign prominently displayed on your desk; closed door to your office; or simply telling people not to bother you.

Another method is establishing a "quiet hour", and educating the people with whom you work that this is your hour - and you would rather not be disturbed during that time. Be honest and tell your co-workers that you will busy during this time each day and will talk with them, help them or return their calls later. Everybody needs a quiet hour.

During this time, plan to complete a project which demands total concentration. Schedule during the part of the day when you are changing from "high" to "low", this part of your day designated as your "quiet hour." Once you communicate to your co-workers that you (and perhaps your supervisor) wish not to be disturbed, you will find others developing similar techniques.

Whatever situation you chose to communicate a period of the day when you do not want to be disturbed, make sure you enforce and take advantage of the "quiet hour." If you permit even one interruption, for one minute, it will take another three or four or five to return to the point upon which you were concentrating. Your "quiet hour" will magnify your effectiveness. If people ignore your "quiet hour", or your boss objects - be assertive! Show your boss the results of this hour. There will be results because you will be able to accomplish more without interruptions. Convince others to adopt this technique.

However you manage to relate your needs to your boss or co-workers, it is still necessary to keep in mind that you are communicating your self-expression from which judgments of you are made. Your methods of communication will present you as either a cooperative, conscientious co-worker, or as disgruntled and disloyal - or worse - disinterested.

3. As A Member Of A Team

Finally, a form of communication in an office situation is that which involves interaction with the entire company staff. This form of communication often involves comparing workloads, benefits or lack of benefits, poor working conditions, and other forms of complaint. When an atmosphere of cooperation should be generated and reinforced, often communcating among staff members takes the shape of being a "gripe session." Learn to direct your interaction with fellow workers on a more positive, learning level.

Do not be guilty of being overly critical of co-workers. No one wants to be criticized. We regret and reject other people suggesting that we should change or that what we have done is not good enough. However, criticism can be useful and should be communicated and accepted as a constructive and objective means of measuring job performance. If you are the focus of the criticism, accept it assuming it is meant as a learning tool - do not be ready to counterattack and defend yourself.

If you are delivering the criticism, be tactful and sincere in showing that you are offering constructive information - not being resentful or domineering. Let criticism work for you and your co-workers - listen, learn and improve. Working as a team persuing the same goals is easier when the avenues of communication among staff members are free of petty and unwarranted jealousies, criticisms or embellished circumstances.

When communicating as a member of a team, remember that you are a part of this group. As such, being malicious or unkind or less than tactful reflects on you individually. Promote an atmosphere of cooperation and your position on the team will be enhanced.

D. You, You, You

1. Here and Now

Here and Now. Today. At this time and in this place. Where are you? Have you made a determination of what you aspire to do with your career? Are you developing skills that you hope to improve as tools toward advancing in your chosen career? Through the text and program, the focus has been on the external elements that make up your working environment and atmosphere. Where you work, how you work and who you work with has been reviewed. Now it is time to review you.

Devise a plan to determine if you are at a point in your career which shows that you have put forth effort and ambition toward achieving a long-term goal. Your plan must be realistic and truthful - if it is not, you will be a loser. As a suggestion, the following personal inventory rating scale may be used as a basis for developing a rating scale designed to show you where you are - here and now:

Skill	Excellent	Good	Fair	Poor
Typing: speed				
accuracy				
neatness				
Telephone: polite				
prompt				
good rep. for agency				
Office: arranged for efficiency				
neat/maintained				
Files: up-to-date				
neat/maintained				
Communication skills: written				
oral				
Personal Office Interactions				

Being honest with yourself, rate whether or not your skills have improved. Add sections relating to your specific responsibilities at your particular agency, office, department or organization. Have you taken advantage of in-service training? Have you taken the time to learn about the services provided by your office, and applied this knowledge to improving your personal skills?

If you are disappointed with the result of your personal inventory rating score, determine to make changes in your direction and do it now! Ask yourself why you haven't taken advantage of training, or other learning experiences. Are you simply lazy? Or, have you become so comfortable in your routine job, that any change would mean exerting an effort.

Taking this self-examination even farther. Consider how you react to your everyday demands as worker; friend; mother, wife, sister/ father, husband, brother, etc.; and ask yourself:

- Do I expect people in my office to know what I need without having to tell them?
- Do I expect my family to know what I need without having to tell them?
- Do I tell more than I listen?
- Do I forget to say "please," "thank you," "your welcome"?
- Do I expect people to understand that I don't really mean the things I say when I am in a bad mood?
- Do I assume that when I am irritated, it is being done to me deliberately?
- Do I use threats and other negative methods of persuasion to solicit help from others?

Self-examination is often painful. But, it can be useful if you are reassessing your position and where you intend to go from this point. Facing those aspects of your career and attitude which may not be pleasant, is an important step toward changing and improving.

Everyone experiences periods of personal crisis. Effort should be made to separate personal and professional problems, although this is not always easy or possible. Learning to cope with your problems and sharing your feelings with your boss or close co-workers, may ease the burden you carry. It is necessary for you to realize that even if you fall short of your own expectations and are experiencing personal crisis, you will survive. Take each day one at a time. Do what you can - no more and no less. Be honest with yourself and the

people around you. Sharing these periods with others avoids multiplying your problems. Your co-workers and your boss will respect your situation and help you through rough periods.

Thus, here and now - begin to take stock of where you are and where you want to go. Consider the strengths you have developed and how to improve your weak areas. Take a good look at your attitude and professional demeanor. Begin a course of action which will help you meet the goals you have set for yourself. Demand from yourself something that you desire, give it top priority and strive for it. Here and Now!

2. Where and When

> "A goal in your mind is a dream. A goal on paper is an objective."

Do you have goals, ambitions or aspirations? If you have no goals, perhaps it is time to establish some. Having already taken an inventory of your technical and personal strengths and weakness, now ask - where do you want to go in life. Once you know - make an exerted effort to reach your desired goal. If your present job will not be an asset to you in reaching your goal, change to a job that will. It will be better for you and your boss.

Goals must be specific, attainable and measurable to be effective. Write your goals on paper to make them a reality and refer to them often. Keep a journal or diary of your daily or weekly activities, focusing on those activities you accomplished which bring you one step closer to reaching your destination. Your goals can be short-term, as well as long-term. Being too rigid is futile. For example, saying that you want to be President of the United States is lofty indeed, but attainable - if in the interim you are a local official, a state official and then a federal official. Partaking in the short-term activities will accumulate and promote success with the ultimate goal.

Where do you begin? When will you begin to realize rewards from your ambition? Your standard of measurements will involve a time schedule and objectives you can utilize to reach your goal. To insure that your goals are specific and attainable:

-know yourself

-know your sources of motivation

-know your level of commitment and responsibility

-know the style, strengths/weaknesses of those people who will play an important part in your goal achievement

-know how to communicate your goals through your actions

-know when to be flexible, anticipate needs, problems, solutions or changes in direction

Obviously your job offers you the most accessible form to reach your goal. It should be a stepping stone to the next level toward goal attainment. Your job provides you a major part of your identity, provides you the equipment to develop healthy self-esteem, self-confidence and self-reliance. Your job should supply you with a source of growth and challenge. Where and when to make moves within your job depends entirely on you and the effort you supply.

Remind yourself that you have skills that others may possess - but you excel in some that others may not. Use this expertise to your benefit. To develop your skills toward attaining a more professional position:

-become involved in what you are doing

-become ambitious by taking advantage of situations which will demonstrate your value as an employee

-become creative and find ways to streamline your job, your office, your department, your agency

-become alert to resources that can aid you in your daily work and benefit you in advancement

-become demanding of yourself.

Strive to attain a certain point, and do not relinquish your effort to succeed. If you are ambitious, you want it known. So little by little you assume more responsibility in your job. Be cautioned, however, not to become obsessed by your drive. People who begin to make more of her/his own importance is inviting problems. You must recognize where and when to step across or stop at the fine line between responsible and irresponsible behavior.

There are many responsible ways of improving your status. Take advantage of:

-reading professional literature on a regular basis which pertains to your organization; your ultimate goal; your special interests or hobbies

-attending training seminars

-continuing your formal education

-joining professional organizations which broaden your horizons, expand your knowledge and provide greater resources

-associate with people who have a variety of interests

-take pride in your appearance and dress and behave professionally

Periodically taking inventory of your achievements, skills and improvements will help to make your goals seem more attainable and realistic. Knowing where and when to exert more effort and where and when to take advantage of opportunities will reap many rewards for you.

3. Then and There

If you have explored the "here and now" and given serious consideration to the "where and when," it is time to take action to reach the "then and there." The self-examination done by analizing your skills is the basis for developing a valid self-image, a positive concept of what you know about yourself. Having also listed and recognized your strengths and weaknesses, your goals became more apparent. Now it is time to take the risks necessary for attaining your goals.

People vary greatly in the willingness to take risks. Secretaries, administrative assistants and other support staff, who are generally women, have been stereotyped as a group not willing to take a career risk; a group that tends to stay with one job, one company or agency; a group that tends to wait to have their performance recognized, and fear new responsibilities. It is important to recognize that risk taking is important in achieving goals.

As you grow older, abilities may diminish or may not be kept current with advancing technology (such as word processing equipment, computers, automatic phone systems, etc.). Stagnation in your job becomes a serious handicap to career advancement. On the other hand, age and experience should work in your favor by improving your abilities and skills, your decision-making judgments, and scope of opportunities open to you. Risk-taking in career moves is inhibited if you allow the fear of failure, disapproval and the unknown guide your course.

If you want to achieve your goals and reach then and there, you must be willing to take certain risks. Good career planning, knowing the risks involved, can be manageable if you:

-acknowledge your risks and include them in your written goals

-evaluate the risks involved and realize that you may not always succeed, but will have alternatives available

-insure that your risks do not compromise or violate your own personal values, or will will hurt others

-set time limits for achieving your goals and realizing that taking risks will be a major factor in maintaining your schedule

Career change or advancement can be a long, complex process. You have the control to make it a smooth and successful transition by considering the steps outlined in the last three sections. You must

also recognize that the move cannot be made without the desire to succeed in attaining your goals, the support of important others in your professional or personal life, and without taking the risk of self-improvement. Capitalizing on your skills, taking advantage of additional training and education, being realistic in your planning and being alert to opportunity will guide your course.

Taking advantage of the many helpful and supportive resources available to you will also assist you in reaching your desination - there and then. Look through information received in the mail for agencies, and groups that may offer something of interest to you. Attend discussion groups concerned with career changes or advancement. Join a local YWCA and participate in the programs they offer for skill developing, building and enhancing. Consider applying for taking the test to be a Certified Professional Secretary. Whatever you do - do something.

You are the keystone of any office operation. As the staff person supporting the daily operations of any office, department, agency, or company you are the first to greet the public, the expert on maintaining working systems, and the one responsible for making all aspects of the business coordinate into a smoothly run machine. If you recognize this importance, capitalize on your skills and abilities and determine to be successful - take the risk. Know where you are "here and now;" be determined to make a plan of "where and when;" and act now toward achieving "then and there."

IV. TIPS/SHORTCUTS/HINTS

-Consider purchasing duplicating paper which is 3-hole prepunched. Especially useful for offices using manuals and other materials in 3-ring binders.

-Answer letters by writing or typing your answer on the original letter. Useful if there is no need to retain the original correspondence. This method, used primarily for requests for information, refreshes the correspondent's memory.

-Stockpile pre-addressed envelopes for those people with whom you frequently correspond. If you enclose return envelopes for the convenience of people who expect to respond to you, pre-type these also.

-Stockpile address labels for frequently used address lists, or if you do frequent mass-mailings.

-Consider preprinting form letters if you find yourself writing the same thing over and over.

-Set up a letter file of frequently used phrases, comments or information. Set up a file of well written special occasion letters for future reference.

-Avoid the habit of xeroxing all correspondence; use carbon paper or carbonsets for non-priority or routine letters.

-Keep a small file box of index cards on your desk for ideas. Label tabs as approriate: filing improvements, new resources, skill improvements, ideas to remember, time-saving tips, etc.

-Don't rely on mental notes. Write ideas down on index cards as stated above, or directly on your planning calendar, or on a notebook kept for the specific purpose of making notes, etc.

-Start each day with the determination to include at least one activity that relates to your long-term goals.

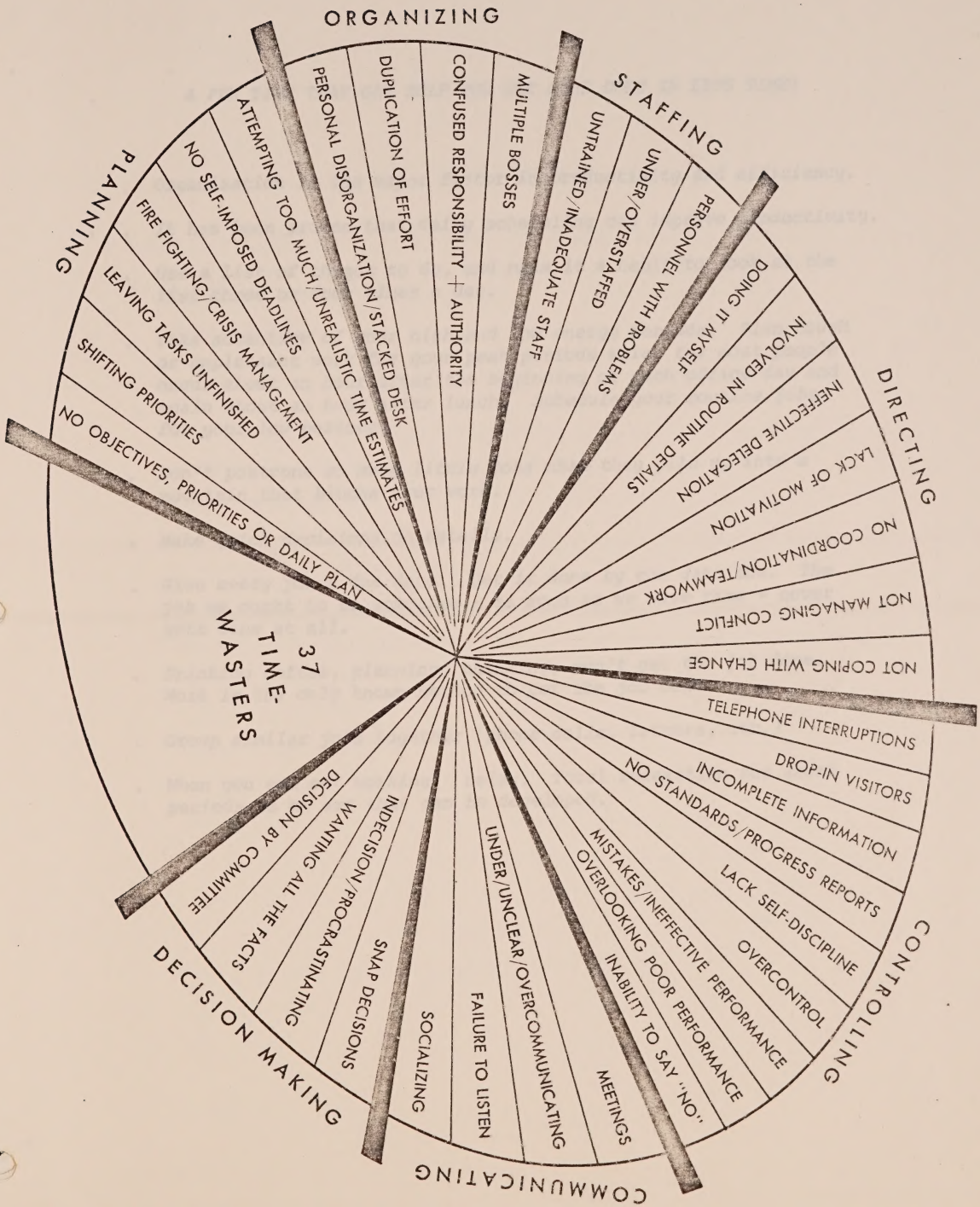
-Don't dwell on past errors. Learn from them and concentrate on the future where your goals will be achieved.

-Each day, examine some activity that you do. Can it be eliminated? Simplified? Combined? Delegated? ???

-It is not enough to organize your environment, also organize your mind. Try not to think about more than one thing at a time - this helps concentration and makes you more productive.

-Greatest gains are made, not by doing more work, but by eliminating unnecessary work.

EXHIBIT 12



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A FEW TIPS THAT CAN HELP YOU GET MORE DONE IN LESS TIME!

- *Organization is the major factor in productivity and efficiency.*
- *It has been proven that daily scheduling can improve productivity.*
- *Use a list of things to do, and make it a habit to look at the list three or four times a day.*
- *Take advantage of your high and low energy periods. Plan tough or unpleasant work for your peak periods which for most people occur about an hour after the beginning of each office day and again about an hour after lunch. Schedule your routine jobs for your low periods.*
- *Don't postpone so many little jobs that they pile up into a mountain that blocks your work.*
- *Make quick decisions on details.*
- *Give every job a due date. Get it done by the date due. The job we ought to do sometime - as soon as we have time - never gets done at all.*
- *Drinking coffee, planning, thinking, won't get the job done. Work is the only known method to get the job done.*
- *Group similar jobs together (phone calls, letters, etc.)*
- *When you are not working: relax. Total relaxation for short periods is an art that can be developed.*

BOSS'S TIMEWASTERS

Select 10, weighting as you go, 10 for No. 1 timewaster; 9 for No. 2, etc.

Telephone Interruptions _____

Drop-In Visitors _____

Meetings _____

Crises _____

Lack of Objectives, Priorities and Deadlines _____

Cluttered Desk and Personal Disorganization _____

Ineffective Delegation _____

Attempting too Much at Once _____

Lack of or Unclear Communication _____

Inadequate, Inaccurate and Delayed Information _____

Indecision and Procrastination _____

Confused Responsibility and Authority _____

Inability to Say "No" _____

Leaving Tasks Unfinished _____

Lack of Self-Discipline _____

Others _____ _____

_____ _____

_____ _____

_____ _____

(For chart of 37 Timewasters see Exhibit 12, page 74.)

SECRETARY'S TIMEWASTERS

Select 10, weighting as you go – 10 for No. 1 timewaster; 9 for No. 2, etc.

Not being kept informed by boss: of his whereabouts, of company policy, of department plans _____

Lack of objectives, priorities, daily plans _____

Attempting too much (unable to say "No" to boss) _____

Lack of organization on part of boss _____

Interruptions by boss while trying to complete his deadline work _____

Office procedures not established, confused responsibility and authority _____

Unclear instructions, incomplete, inadequate information _____

Procrastination, indecision _____

Socializing, drop-in visitors _____

Switching priorities, confused priorities _____

Poor, inadequate filing system _____

Multiple bosses _____

Equipment problems _____

Errands, trips to copying machine _____

Redoing letters because of incorrect dictation by boss _____

Leaving tasks unfinished _____

Rescheduling of meetings and other appointments _____

Not delegating enough to others _____

Lack of independence, overcontrol by boss _____

Telephone _____

Mistakes, ineffective performance _____

Failure to listen _____

TABLE OF EXCUSES

To save time for management and yourself, please give your excuses by number. This list covers most situations.

1. That's the way we've always done it.
2. I didn't know you were in a hurry for it.
3. That's not in my department.
4. No one told me to go ahead.
5. I'm waiting for an O.K.
6. How did I know this was different.
7. That's his job, not mine.
8. Wait 'till the boss comes back and ask him.
9. I forgot.
10. I didn't think it was very important.
11. I'm so busy I just can't get around to it.
12. I thought I told you.
13. I wasn't hired to do that.
14. When in doubt--Throw it out.

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